

Integrating Transportation and Land Use Planning: Outreach to Planning Commissioners

Final Report:

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The contents of this document do not necessarily reflect views or policies of the State of Oregon.

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Chapter 1

Introduction

Introduction

In the 1990s, the Oregon Department of Land Conservation and Development (DLCD) and the Oregon Department of Transportation (ODOT) established the Transportation and Growth Management (TGM) program. The program's mission is:

To enhance Oregon's livability, foster integrated land use and transportation planning and development that results in compact, pedestrian-, bicycle-, and transit-friendly communities.

TGM uses "smart development" planning principles to implement the program mission. The smart development principles are to:

- increase opportunities for the use of all transportation modes as an alternative to dependence on the automobile,
- efficiently utilize land and existing urban services within urban growth boundaries,
- create transportation options by mixing development and land uses within existing and new urban centers, and
- design the urban environment to a detailed, human scale.

DLCD and ODOT, through the TGM program and their individual agencies, recognize the need to provide technical assistance and outreach to counties and cities in Oregon. Both agencies have produced a variety of technical assistance documents, maintain Web sites, and devote staff time to these activities. Technical assistance and outreach, however, are not the primary missions of TGM, DLCD, or ODOT.

In 2002, the Community Planning Workshop at the University of Oregon conducted an evaluation of DLCD's technical assistance and outreach efforts as well as identifying the technical assistance and outreach needs of cities and counties.¹ One of the key findings of that study was that planning commissioners and city recorders/administrators lack knowledge about Oregon's land use planning program.

Consistent with the TGM program objectives and the findings of the 2002 CPW study, this project focused on technical assistance and

¹ *Department of Land Conservation and Development Technical Assistance and Outreach Needs Assessment*, Community Planning Workshop, University of Oregon, June 2002.

outreach to planning commissions on the topics of transportation efficient land use and smart growth principles.

Purpose

This primary goal of this project was to raise the awareness of planning commissioners on smart growth issues. A secondary goal of this project was to gather information from local planning commissioners on technical assistance and outreach tools that would better prepare them for their duties.

The project included development of written and visual materials, outreach workshops to local planning commissioners and elected officials, and informational interviews with professional planners. The goals and objectives of the project are summarized below:

1. To develop a model for successful dialogue with local government partners in the implementation of statewide transportation and land use planning goals.
 - Provide informational materials to local decision-makers, primarily planning commissioners, that clarify basic planning concepts and state policy interests in local transportation and land use planning efforts.
 - Identify and document local opportunities and constraints to successful smart development and the implementation of integrated land use and transportation plans.
 - Initiate an on-going process that identifies the intersection of local, regional and statewide interests related to integrated transportation and land use planning.
2. Apply the expertise of the academic institutions in conducting research and providing educational opportunities in order to demonstrate innovations in the fields of transportation and land use planning.
 - Provide research and field experience to students interested in the transportation and land use planning fields.
3. To create a model partnership between two universities and two state agencies (PSU, UO, ODOT and DLCD).

Organization of this report

This report is organized into the following chapters:

Chapter 2 – Methods summarizes activities that the CPW team engaged during the project.

Chapter 3 – Key Findings presents the findings from CPW's research and outreach activities.

Chapter 4 – Project Reflections and Recommendation includes general observations about the project, specifically about conducting workshops. It also includes a set of recommendations regarding future technical assistance and outreach efforts.

This report also includes six appendices:

Appendix A - Summary of Informational Interviews

Appendix B - Minutes of Advisory Committee Meetings

**Appendix C - Summary of Planning Commission
Workshops**

Appendix D - Minutes from Smart Growth Summits

Appendix E - Workshop Evaluation Form

Chapter 2

Methods

This chapter provides an overview of the research and outreach methods for this project. The methods used to complete this project are consistent with the project's objectives and products. The two primary products of this project were:

- Planning commission workshops on transportation and land use, and
- Written materials on a variety of smart growth topics.

Because the purpose of this project was technical assistance and outreach, the CPW team did not conduct any primary research. Instead, we focused our efforts on reviewing and evaluating existing outreach materials and developing strategies to engage local planning commissions in discussions about transportation, land use, and smart growth concepts. To prepare for the workshops and develop guidelines for written materials, CPW conducted a literature review, informational interviews, and facilitated project advisory committee meetings. In addition, the project included two “summit” meetings where the CPW and PSU teams met with a broader group of stakeholders to present project progress and discuss next steps.

Literature review

CPW began the project by reviewing literature and websites on transportation, land use, and smart growth. This step was intended to provide the CPW team with a better understanding of key concepts that would be integrated into the planning commission presentations and the outreach materials.

Informational interviews

To develop a better understanding of how smart growth is being implemented in Oregon, CPW conducted informational interviews with 14 individuals knowledgeable about transportation efficient land use and smart growth. The interviews focused on key issues, opportunities, and barriers to achieving transportation-efficient land use patterns and to implementing smart growth projects. The data from the interviews was used to help develop workshop presentations and discussion questions. Summaries of the interviews are presented in Appendix A.

Advisory committee meetings

CPW's efforts were guided by an advisory committee comprised of TGM and ODOT staff, local planners, consultants, and planning commissioners. The Advisory Committee met four times over the course of the project to review progress and make suggestions for how the CPW and PSU teams should address specific project issues and to brainstorm recommendations. Minutes

from the Advisory Committee meetings are presented in Appendix B of this report.

The purpose of the first advisory committee meeting was to create a list of topics for potential outreach materials and receive direction on how the CPW and PSU team should approach the planning commission workshops. The Advisory Committee also developed a list of communities targeted for workshops.

The purpose of the second advisory committee meeting was to review CPW's draft PowerPoint presentation and brainstorm discussion questions for the workshops.

The purpose of the third meeting was to provide the advisory committee with an update on project activities and key findings to date, to discuss the agenda for Summit #2, and to present the draft outline for the final report.

The purpose of the fourth advisory committee was to discuss key project findings and, using the recommendations developed at Summit #2, create final project recommendations about how state agencies can increase outreach /technical assistance.

Planning commission workshops

The foundation of this project was a series of 13 planning commission workshops. The purpose of the workshops was twofold:

1. Provide local planning commissions with information on the integration of transportation and land use planning and smart growth concepts; and
2. Engage planning commissioners in a discussion about local issues, goals, and technical assistance and outreach needs.

The initial concept was to conduct two-hour workshops. The workshops were to include a presentation by state agency staff members or members of the Oregon Chapter of the American Planning Association (OAPA) titled *Telling the Oregon Story*, which provides an overview of the Oregon land use planning system. The OAPA presentation would be followed by a second presentation by the CPW team titled *Making Connections: Tools for Integrating Land Use and Transportation in Local Communities*. The presentations would be followed by a discussion of the concepts and local transportation and land use issues.

Guidelines for the workshop approach and locations were discussed in the first Advisory Committee meeting. It was decided that the most effective use of time would be to create one PowerPoint presentation about the relationship between transportation and land use planning and smart growth strategies. The *Telling the Oregon Story*, although a well-crafted presentation, would be too general for our audience. The target audience for the presentation and discussion was planning commissioners, however, CPW was encouraged to open the meetings to city councilors, planning staff, DLCD field representatives, and transit district representatives. The

planning director of each community was in charge of inviting the guests to participate in the workshop.

An internal working group of the advisory committee created a prioritized list of communities to be contacted for potential workshops. The initial criteria for choosing cities were population distribution, geographic distribution, and areas where there have been recent ODOT/DLCD efforts. In addition, it was advised that we target communities over 2500 residents. CPW contacted 28 communities, but conducted workshops in just 13 communities. Of the 15 communities that declined to have a workshop, many communities did not have time on their commission agenda for additional presentations or were not discussing transportation and land use issues at the time of the project, and therefore, did not take advantage of the opportunity for a workshop. Subsequently, the initial criteria for selecting communities was followed initially, but was abandoned in the later stages of the project as it became clear that we had to have willing communities to conduct successful workshops.

As we initiated the process of setting up workshops, it became clear that tailoring the workshops to match specific community issues would be the most effective approach. Communities were eager to have an opportunity to discuss current local issues instead of engaging in theoretical conversations about smart growth and transportation efficient land use. As a result, CPW staff worked closely with planning staff in the jurisdictions to identify community issues and customize the PowerPoint presentation to address local issues. The CPW team also made an effort to customize the PowerPoint by including photographs and examples of smart growth projects in the presentation.

Advisory Committee members perceived that commissioners would react negatively to the term “smart growth” and recommended use of another term. CPW tested this in every workshop by asking commissioners (1) whether they were familiar with the term, and (2) if so, what it meant to them. Table 2-1 summarizes the location, date, and topic of each workshop.

Table 2-1. Summary of planning commission workshops

City	Date	Number of Participants	Topic
Sweet Home	March 17	8	Narrow streets
Klamath Falls	April 14	12	Transportation 101, Relation between transportation plan and comprehensive plan
Grants Pass	April 23	10	Transit Oriented Development
Estacada	April 24	7	Downtowns and transportation
Stayton	April 14	13	Creating a TSP
Talent	April 24	10	Transit Oriented Development
Medford	April 28	24	Transit Oriented Development
Reedsport	May 27	8	Creating a TSP
Coburg	June 4	8	Discussion
Canby	June 9	6	Subdivisions that incorporate smart growth strategies
Toledo	June 11	7	Creating a TSP
Redmond	June 16	12	Implementing smart growth strategies
Gladstone	June 17	7	Discussion

In ten of the thirteen communities we began the workshop with a PowerPoint presentation followed by a discussion of the topics covered in the presentation and then asked a series of questions about their experiences with integrating transportation and land use planning. The same questions were asked in all communities so that we could identify similarities and differences between communities. The standard questions included:

1. What are your community's transportation and land use issues?
2. What are the greatest obstacles/barriers to integrating transportation and land use planning?
3. What kinds of assistance do you need to implement your land use and transportation goals? How can the state assist you?

In two communities (Coburg and Gladstone), we engaged the commissioners only in a discussion of the standard questions. CPW used this approach because these communities wanted us to come talk with the planning commission but they did not have enough time in their schedule for a complete workshop.

In one community (Redmond) we chose not to use the PowerPoint presentation in the workshop and lead a discussion about smart growth

principles and implementation strategies in addition to the standard discussion topics.

The workshop summaries are presented in Appendix C.

Smart Growth summits

The UO and PSU team held two joint smart growth summits during the project. The purpose of the summits was to engage the greater planning community in the project.

Consistent with our TGM work program, the first summit was intended to provide students an opportunity to present information from the pilot workshops and obtain constructive feedback from the invited guests.

Specific goals included:

- Facilitate coordination between the PSU and UO project teams
- Receive input on workshop process
- Receive input on educational materials

Summit #2 attracted a diverse group of participants from DLCD and ODOT staff, to planning staff and commissioners to private consultants. After a presentation of project findings, the 20 participants broke into small groups to discuss specific recommendations related to the technical assistance and outreach needs identified by the planning commissioners. The list of recommendations generated at this summit was used to develop the final project recommendations found at the end of Chapter 4.

Summit summaries can be found in Appendix D.

Technical assistance/outreach material

CPW created three types of written and visual materials to be distributed to planning commissioners, planning staff, and lay people. The purpose of the materials is to provide short, concise information about specific smart growth concepts. Table 2-2 provides a list of technical assistance and outreach materials developed as part of this project.

Table 2-2. Summary of technical assistance/outreach material

Briefs	Case Studies
Smart Development	Mixed-use development – 4 Oaks Centre, Central Point, OR
Transportation System Plans	Subdivision – Canyon Rim Village, Redmond, OR
Transit Oriented Development	Subdivision – Quail Run, Eugene, OR
Transportation and Downtowns	Subdivision – Edwards Addition, Monmouth, OR
Funding Transportation Improvements	
Connectivity	

Chapter 3

Key Findings

This chapter presents key findings from CPW's work on this project. The findings presented in this chapter were derived from the work program elements:

- Informational interviews
- Advisory committee meetings
- Planning commission workshops
- Smart growth summits

Our findings, however, are not organized around the four components of the work program. Instead, we chose to organize the findings around key topic areas identified by planning commissioners in the 13 workshops. The key findings presented in this report will help the state better understand the issues communities face.

Issues and Barriers to Smart Growth

- **Local governments indicated they have limited funds to pay for transportation improvements that integrate smart growth principles.** This was a theme expressed in every jurisdiction where CPW conducted workshops. The TPR requires jurisdictions to develop financially constrained capital improvement programs. Not surprisingly, jurisdictions are investing dollars in high profile/priority projects such as road widening and resurfacing. Local priorities typically do not include projects that would enhance pedestrian and bicycle systems and other improvements that integrate smart growth principles. Most of the jurisdictions expressed a desire to implement transportation projects that would enhance pedestrian and bicycle systems.

A corollary to lack of funding is the lack of understanding of how to access funding. Planning Commissioners expressed a need for a better understanding of (1) what external funding sources are available to cities and for what types of projects, and (2) how to access those funds. Several jurisdictions expressed dissatisfaction with the TGM grant program. Key issues were that the process is “confusing,” and that the amount of bureaucratic oversight is excessive and “very tedious.” Some jurisdictions indicated that they no longer apply for TGM grants even though they have projects that would be eligible.

- **Local governments suffer from a lack of resources for research and planning activities.** Lack of resources includes three components: (1) lack of funding; (2) lack of staff resources; and (3) lack of technical capacity. Several jurisdictions CPW went to indicated that key planning documents such as their comprehensive land use plan and zoning ordinances were dated and ineffective. In many instances these documents presented significant barriers to smart growth. Many planning commissioners expressed a desire to update these documents. While TGM and DLCDC have provided technical assistance and periodic review grants to jurisdictions for updating plans, S.B. 544 and other policies are excluding increasing numbers of communities from planning requirements. Moreover, the current state budget crisis will probably result in reduced grant funding for local planning efforts.

Funding relates directly to the second issue: staff resources. Less funding means less staff to engage in planning efforts. While many jurisdictions hire consultants to assist with plan updates, there is still a considerable amount of effort that falls to local staff—primarily in researching funding options, providing the commission with technical assistance and steering plans through the local review process.

The final issue—lack of technical capacity—primarily applies to small jurisdictions that have limited professional planning staff. In one community, the part-time staff planner stated that he would have to rely on volunteers and the planning commission to assist him with developing their Transportation System Plan. Lack of technical assistance can be partially addressed through grant programs, but grants do not address broader issues related to the complexity of planning and the fact that planning is one of many roles that city administrators and recorders must play in small jurisdictions. If these staff do not have the resources to adequately plan, they are unlikely to have resources to train their planning commissioners in their fundamental duties.

- **Local governments often have difficulty balancing state mandates with local goals and needs.** Jurisdictions identified many state policies that present barriers to achieving local objectives. Most of the issues centered on policies that ODOT implements. These include requirements for TSPs, access management, and ODOT's goals for reducing intra-city travel times on state highways.

Commissioners stated that ODOT's goals were frequently in conflict with local economic development, land use, transportation, and safety goals. Moreover, local jurisdictions see some of ODOT's policies as a significant barrier to implementing smart growth principles in their jurisdiction. One community described the conflict as “mobility standards verses livability standards.” This city wanted to increase

pedestrian connections and safety in their downtown but could not create a crosswalk because of state road standards out of their control.

- **Some local governments have difficulty preparing and implementing Transportation System Plans.** Several smaller jurisdictions we went to questioned the need for a TSP in a small or slow-growing jurisdiction. They felt that the process required too much time and money and that it ultimately benefited DLCD and ODOT more than the local jurisdictions. Some communities indicated that they developed draft TSPs with the assistance of consultants, but that when they got to the review stage, their planning commissions did not ultimately adopt them. The key reasons were either they did not understand the plans, or that they did not think they reflected local goals.
- **Aging transportation infrastructure is an issue in most communities.** This is not an unexpected finding—ODOT has long identified a significant funding shortfall for the state highway system, so it is no surprise that local jurisdictions are experiencing similar issues. Local governments desire innovative ways to address aging infrastructure, but funding remains a barrier. Some jurisdictions have adopted a local gas tax or transportation fee, but such funding mechanisms are broadly unpopular in most jurisdictions. Many of the communities do not have transportation system development charges to help generate revenue and feel that they must take care of their existing infrastructure before they build needed new roads.
- **Local governments are experiencing the consequences of past land use and transportation decisions.** One of the issues that emerged repeatedly in the planning commission workshops was how past development was impacting communities' efforts to establish a more cohesive transportation system. Past development patterns have lead to a lack of street connectivity, insufficient capacity, poor or non-existent pedestrian facilities, and facilities that are not built to current standards.

It is difficult to understate the degree to which historical decisions are affecting current planning and capital improvement programs. Several jurisdictions asked CPW questions about strategies they might implement to address system deficiencies. As with many local issues, communities' ability to address these issues is limited by funding.

While many of the consequences are a result of development that occurred before jurisdictions had land use plans and TSPs, some of them can be traced to inter-jurisdictional differences. Many small cities have urban service agreements where the county reviews and approves development outside of the city limit but inside the UGB. These agreements frequently do not require counties to require

developers to adhere to city standards for roads and other infrastructure.

- **Lack of connectivity is a key issue facing local governments.** This issue emerged in nearly every city where CPW conducted workshops. Connectivity issues are primarily related to the road system, but jurisdictions also identified lack of pedestrian and bicycle connectivity. One community described their bicycle paths as a spoke with no center to connect the various paths. Cities identified many barriers to increasing connectivity such as existing development patterns, topography, funding, and community members not wanting change.
- **Many communities have inadequate pedestrian infrastructure.** This finding relates to other findings on connectivity and impact of past decisions. Many jurisdictions indicated that limited pedestrian infrastructure, particularly along arterials and major collectors, is an area of concern. These jurisdictions indicated that having additional technical assistance on how to address deficiencies in pedestrian infrastructure would be beneficial.
- **Pedestrian safety is a concern for communities.** This issue relates directly to the previous issue—lack of pedestrian infrastructure is a contributing factor to pedestrian safety. Communities indicated need for technical assistance about appropriate pedestrian standards as well as street widths for residential neighborhoods and strategies to encourage both cars and pedestrians downtown. Lack of funding was one of the major barriers to addressing pedestrian safety. Jurisdictions' also cited ODOT policies about mobility as a barrier to pedestrian safety within cities.
- **Lack of coordinated planning and standards hinders integrating transportation and land use planning.** This emerged as a significant issue in our workshops. Commissioners identified coordination of planning activities as a barrier to implementing smart growth in unincorporated areas inside urban growth boundaries. Many communities expressed concern about creating more stringent standards within the city limits and thereby discouraging development to occur within the city. In addition, when a city annexes new land the city may become liable for services that were not developed to city standards. Because funding is a major barrier, cities are looking for innovative methods to upgrade these areas without unduly burdening residents with costs.
- **Limited community involvement in the planning process hinders the planning process.** Several jurisdictions cited lack of community involvement as a barrier to implementing smart growth strategies. Residents not taking the time to get engaged in planning processes, but coming out in opposition at the final stages are one

component of this issue. Without community involvement, cities have a hard time developing and implementing a coherent community vision. Planning commissioners felt that many community residents do not have much knowledge about the Oregon planning program and do not understand that their involvement is a major element to the success of the program.

- **Community perceptions about smart growth influence the success or failure of projects.** Although many planning commissioners indicated they agree with smart growth principles, they also understand that many residents fear that smart growth strategies will change the feeling of their community. Some community members do not want to increase density, alter street widths, or provide bicycle and pedestrian paths. In many communities, the market is leaning toward suburban low-density subdivisions. Especially in southern Oregon, people are moving from California wanting to escape high-density living and reject the higher density principle heralded by smart growth advocates. Some planning commissioners expressed concern that new development with higher densities and mixed housing types will lower property values around the new development.
- **Many communities have regulations that do not allow smart growth strategies.** Several jurisdictions indicated that their comprehensive plans and development codes did not allow, or were not supportive of smart growth principles. CPW identified several instances where developers took the initiative of working through a code revision process with a community in order to complete a project. A few communities had used the TGM code assistance program and felt that it was helpful.
- **Some developers are reluctant to build smart growth projects.** Perceptions of demand and the lack of successful smart growth developments in many jurisdictions contribute to developers' reluctance to try new smart growth projects. Commissioners think that developers find it difficult to secure funding and hard to get an accurate appraisal. Thus, developers and lenders stick with formulas that are successful—which in many jurisdictions precludes smart growth projects. One community had taken the initiative to revise their code to provide for smart growth strategies but was experiencing difficulty finding developers who were willing to take advantage of it.

Findings from Workshops and Interviews

- **A majority of planning commissioners had heard the term “smart growth” and could identify some key smart growth principles.** This finding was somewhat of a surprise to the CPW team. The CPW team as well as the Advisory Committee anticipated that many planning commissioners would have negative images of

smart growth. What we found was that a majority of planning commissioners were familiar with the term and could name one or more smart growth principles, and that most (not all) jurisdictions had neutral or positive feelings about smart growth.

- **Commissioners and practitioners displayed a range of views of smart growth.** One of the findings of our work was that practitioners and planning commissioners displayed a range views of how effective smart growth can be as a planning tool. These views ranged from highly skeptical to very supportive. In general, practitioners tended to be much more pragmatic and skeptical that smart growth can be effective, particularly in smaller communities. One practitioner suggested the only thing small jurisdictions can do to promote smart growth is to regulate “snout houses.” While many practitioners were skeptical that smart growth could be successful, particularly in small communities, they were generally supportive of the concepts.

Planning commissioners also shared a range of views, but tended to be less informed than practitioners on the topic. Commissioners in small, slow-growing or declining jurisdictions questioned how the implementation of smart growth applies to their community when little growth is occurring.

- **Workshops are an effective, but labor-intensive, way of conducting outreach.** The workshop evaluations suggest that workshops are an appropriate mechanism to conduct outreach with planning commissioners. Many commissioners indicated they prefer personal interaction and the ability to ask questions and have discussions among their peers regarding local issues. An obvious limitation is the amount of effort it takes to organize and conduct workshops. CPW found that each workshop required at least 20 hours of effort to complete all of the work required to conduct a workshop.
- **Many communities were unreceptive to holding planning commission workshops on transportation efficient land use and smart growth.** Many communities CPW contacted did not want to have workshops. Fifteen communities declined our offer to have a smart growth workshop. Reasons included that their city is not currently involved in transportation issues, interested but didn’t fit within their time frame, already feel knowledgeable about smart growth principles, and were too busy.
- **Partnering state agencies with academic institutions provides several benefits.** One of the core objectives of this project was to create partnerships between the TGM program and universities. CPW’s evaluation of this partnership is that it was largely successful from all perspectives. The benefits to students participating in this project were substantial. They received opportunities to interact with planning students from PSU, planning commissioners, and seasoned

planning staff from around the state. Faculty also benefit by having the opportunity to engage communities and better understand local issues. Communities' benefit by having workshops and the expertise of the universities. TGM benefits by meeting outreach needs and identifying issues in small jurisdictions.

Technical assistance and outreach needs

One of the primary objectives of this project was to identify the types of technical assistance and outreach that would benefit planning commissioners. Planning commissioners and staff identified a number of ways the state could assist with increased technical assistance and outreach. We have categorized the needs into 10 topic areas.

- **Funds for implementation strategies.** Funding was a top priority in every jurisdiction CPW visited. Planning commissioners would like additional information on a variety of funding issues. The technical assistance need is for (1) a consolidated list of funding sources that can be used for different types of projects including maintenance, pedestrian and bicycle paths, and new roads, (2) information on strategies to access those funding sources (grant writing workshops, etc.), and (3) information on how to access the large pools of funds available for capital improvements. One example is materials that would describe the process of getting a local project from concept to the State Transportation Improvement Program, to construction. As part of this project, CPW created the fact sheet "Funding Transportation Improvements."
- **Strategies to engage the public.** Planning commissioners identified a need to engage the public early in the planning process. The key need is to raise the level of public awareness about the value of land use and transportation planning as well as smart growth principles. The DLCD publication *How to Put the People in Planning* is a good start, but publications are insufficient to address the broader need. This need has also been identified as a priority with the Oregon Chapter of the American Planning Association (OAPA) who is developing a project called *Engage Oregon*. The Engage Oregon project has already resulted in more than 50 presentations by OAPA members to local groups—primarily neighborhood associations.
- **Examples of successful smart growth projects.** CPW heard many times that planning commissioners understood smart growth concepts and that they were generally supportive of the concepts, but lacked good examples of successful smart growth projects. Many planning commissioners were skeptical that adopting plan and ordinance amendments that support smart growth will actually lead to results on the ground. Communities would like (1) examples of smart growth projects - from the most simple (e.g. street lamps) to highly complex (e.g. transit oriented development) located in small and medium-sized communities, and (2) a broad set of criteria by which to evaluate the

success of projects.

One planning commissioner asked for examples of successful projects, specifically requesting projects that had 20 or 30 years of history. The answer to this is difficult because smart growth is a relatively new concept and there are different measures of success that extend far beyond getting a project done that incorporates such smart growth principles as mixed-use, higher densities, and pedestrian features. Those may be criteria that are important to planners, but other important questions remain: Was the project financially viable? Did it result in a stronger sense of community? Were there other unintended outcomes of the project such as higher traffic? All of these questions will be important to address in case studies so that cities have a better understanding of the implications of smart growth projects.

The key to successful smart growth projects is in the details. Every jurisdiction CPW visited could point out areas in their community where smart growth principles had been implemented. Smart growth principles can be implemented through a series of small, incremental policies, or through major plan and code revisions. The need is for documentation of various “best practices” that result in successful smart growth developments.

As part of this project, CPW developed four case studies describing a mixed-use development in Central Point, Oregon and three subdivisions that incorporate smart growth principles. (See Appendix E.)

- **Supporting data for basic smart growth strategies.** In addition to case studies, planning commissioners and staff felt like they needed more technical information about the components of a successful smart growth project. They expressed a desire to understand the rationale behind the theoretical concepts of smart development. Information about the population base needed to support a grocery store or other commercial uses would be helpful for jurisdictions in locating neighborhood activity centers, in spacing “nodes,” and in other elements of smart growth. Commissioners indicated that they would like data on the safety and cost savings of narrow streets, information about alleys and couplets, and traffic generation data for mixed-use developments. They want to know specific information that will help them evaluate the need for smart growth projects and/or create successful implementation strategies.
- **“Planning 101” publication series.** Many planning commissioners indicated a need for basic information on how planning works. DLCD has a publication titled *The City Recorder’s Guide to Planning* that targets staff in small jurisdictions. CPW is unaware of a similar publication for planning commissioners. OAPA has offered basic planning commission trainings for some time, but they also charge a

fee. CPW developed a 60-slide PowerPoint presentation as part of the *DLCD Technical Assistance and Outreach Needs Analysis*. The need is for materials that provide a brief introduction into the roles and responsibilities of planning commissioners. A good place to start would be to disseminate the CPW slide show and gather input on how it should be changed to better reflect what planning commissioners need to do their jobs. Supplementing the slide show with a series of modules exploring different topics would be a logic next step.

- **Assistance with establishing collaborative planning processes.** One of the key issues identified by planning commissions was conflicting objectives at different levels of government. Planning commissioners requested tools or assistance with establishing collaborative planning processes that would help work through inter-jurisdictional issues. For example, one jurisdiction wanted state assistance in working with a rail carrier, another jurisdiction was having difficulty working with the county in regulating the development outside the city limits but inside the urban growth boundary.
- **Code development.** This need was previously identified by TGM. The *Smart Code Development Handbook*, and the *Small Cities Model Code* are good examples of technical assistance resources available to jurisdictions. The need here is not so much for additional technical assistance materials, but direct interaction and assistance with the code development process. One community expressed frustration with TGM's example codes indicating that "one size does not fit all" and they would appreciate a more customized approach by TGM.
- **Design review process.** Several communities identified design review as a policy option they would like to consider. The need here is for fact sheets on design review standards and how they get implemented as well as examples of urban forms that promote smart growth principles.
- **Planning commission workshops.** CPW received positive reviews of the planning commission workshops. These comments came both from commissioners and from staff. The key elements identified as positive were the ability to interact with other commissioners and the CPW team, no major reading requirements, and the ability to learn more about a local issue. Commissioners suggested the following topics for future workshops:
 - New member orientation – role of the planning commission, Oregon planning system 101
 - Case studies of smart growth development
 - UBG expansion
 - Market and how it controls development

- Code development
- Design review
- Regional planning – cities and counties working together

Preferred format for technical assistance and outreach

Knowing the desired topic areas of technical assistance and outreach is only the first step of a successful outreach program. If the format of the technical assistance is not appropriate for planning commissions, the effort will become futile. This section summarizes commissioners' preferences for the format of technical assistance and outreach.

- **Conduct planning commission workshops.** Planning commissioners are volunteers that usually have other jobs during the day. Workshops should be close-by to limit travel time and expense. Most commissioners preferred that the workshops be held in the evening (preferably 7:00 – 9:00 p.m.) and be about relevant community topics. They recognized the benefit of inviting a variety of participants including city councilors, city staff, developers, and non-profit agencies.
- **Hold field trips.** In addition to workshops, planning commissioners would like to have the opportunity to go on field trips to facilitate experiential learning. They value personal interactions with people and want to learn more about moving projects from the idea into reality. The field trips would allow commissioners to meet with the people who have developed the project and actually see how the elements work together.
- **Distribute short written materials.** Most planning commissioners do not have time or desire to read long technical assistance guides. They want short concise information about specific topics that they can reference when trying to make a decision. The written material should include photographs and/or diagrams and information about ways to learn more about the subject.
- **Create planning commissioner network.** Professional planners in Oregon use the Oregon Planning Network (OPN) to discuss questions and post planning related activities via the Internet. This cyber connection allows a planner in La Grande to have instant access to planners in Ashland that might be dealing with a similar issue. Similar to OPN, many planning commissioners expressed desire for a way to communicate with other planning commissioners via the Internet. This cyber network could be a place to post trainings and encourage interaction between various cities without having to pay for travel and lodging expenses.
- **Conduct planning commission conferences.** Similar to the planning commission network, the idea of the planning commission conference stems from the need of planning commissioners to learn

from each other and create a feeling of cohesion amongst themselves. At a planning commissioner conference, workshops could be specifically geared toward planning commissioners and could cover a range of topics from “The Role of the Planning Commissioner” to more technical topics such as “Smart Growth Design Review Guidelines.”

- **Facilitate a speaker’s series.** Planning commissions rely heavily on planning staff for technical assistance. Repeatedly, commissioners listed “Staff” as key tools that they use to integrate transportation and land use issues. As budget cuts begin to limit staff resources, speakers will become more important tool for educating planning commissioners and cities about planning topics. The majority of commissioners believed that the series should be available to the entire community to facility greater community-wide learning.

Chapter 4

Project Observations and Recommendations

This chapter presents a set of observations on the project process. We use the term “observations” rather than evaluation, because we did not conduct a formal evaluation of the project. Nonetheless, the CPW team learned many valuable lessons that can help inform future technical assistance and outreach efforts.

This chapter concludes with a set of recommendations that were derived from Summit II and the final Advisory Committee meeting. The recommendations focus on future TGM technical assistance and outreach activities.

Observations on planning commission workshops

Team perspective

As described in the methods section, the majority of the workshops consisted of a PowerPoint presentation about the connection between transportation and land use and a specific community issue followed by a discussion. This combination of elements worked well – as one element allowed us to present information about smart growth and transportation efficient land use and the other element, the discussion, allowed us to generate a dialogue with commissioners, staff, other participants, and the CPW team. Many workshop participants enjoyed hearing the perspectives of other people in the room during the discussion.

With each workshop, we improved our presentation and our facilitation skills and learned many lessons that may be helpful to presenters in the future.

- **Tailor presentation to address community issues.** Communities appreciated information about specific land use and transportation issues that directly applied to their community. The most successful workshops were those where the planning community was actively engaged in the topic that we were discussing. For example, communities that were updating their TSPs were appreciative of the TSP overview that we provided. However, tailoring the presentation to a community issue was labor intensive. It required conversations with the planning director, research into the community, and research about the specific issue. Because commissioners have been on the commission for varying lengths of

time, it was difficult to know their level of understanding about certain issues; therefore, we tried to provide a mix of basic and advanced information.

- **Provide examples of smart growth elements already present in the community.** One of the most common misconceptions about smart growth is that it is an “all or nothing” concept. This is not the case. Most of the communities where we conducted workshops had already incorporated elements of smart growth into their community. Highlighting what they were already doing became an important part of the workshop. Implementing comprehensive smart growth strategies will take time - it is important to stress that cities can implement smart growth as a series of small deliberate projects as they work toward a greater community vision.
- **Provide case studies of successful projects.** Planning commissioners are more interested in the “nuts and bolts” – the details – of smart growth projects than the theoretical concepts that support the ideas. They wanted to know how the projects were financed, how the city worked with the developer, how the community reacted to the development, how it was marketed and how it impacts surrounding uses. Being able to discuss examples of real projects that have been developed in Oregon helped dispel some of the skepticism about smart growth.
- **Invite a mix of participants.** Traditionally, planning commissioners and city councilors have not had many opportunities to work together on issues. One body is in charge of making rules and the other body is in charge of making sure that they get carried out. In six of the 13 workshops, city councilors in addition to planning commissioners attended the workshop. Both bodies agreed that the joint sessions were beneficial because of the opportunity to share ideas and learn more about different perspectives.
- **Allow ample time for discussion.** Planning commissioners like to talk! The facilitator had to be prepared to keep the discussion on track or the commissioners would discuss tangential topics. In two workshops, we only had half an hour for the entire workshop. In both these communities, the discussion felt rushed and participants indicated that they would have liked additional time. Based on our experience, about one and a half to two hours would be the ideal amount of time for a workshop.
- **Promote an informal atmosphere.** Most planning commissions use the formal council chambers for their meetings. This type of room is not conducive to discussion amongst the commissioners, staff, and other participants. Our best meetings were those in informal rooms in which we all sat around a table to promote an atmosphere of sharing instead of lecturing. Moreover, we found that conducting the workshops during work sessions rather than

regularly schedule public meetings was far more conducive to a successful workshop.

- **Utilize expertise in the room.** Although CPW did research into the community before the workshop, the local planning staff obviously knew much more about local issues than we did. Staff provided valuable insight into the discussion and should be incorporated into the discussion.

Commissioner perspective

After each of the workshops, the participants completed an evaluation form. The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. A total of 94 evaluations were completed from 10 of the 13 workshops. Due to time constraints, CPW did not conduct evaluations in three of the meetings; this is reflected in the variation of the number of responses by question as presented in Table 4-1. Among those who completed the evaluation, there were 67 planning commissioners, one former planning commissioner, 6 planning directors, 7 planning staff, and 13 individuals in other positions. Key findings included:

- Sixty-four of 67 planning commissioners responded to the question of how long they had been in the position. The average length of time was 4.8 years, with the range of 1 to 20 years.
- Seventy-three of the participants indicated that they had heard of the TGM Program before the workshop (n=93).
- When asked what form they would like to see the written materials, responses were split between paper-based, web-based, and both. Twenty-three participants indicated they would like paper-based; 18 indicated they would like web-based; and 40 would like both.
- Prior to our presentations, the participants had a moderate level of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.6 regarding level of knowledge, with the responses ranging from 1-5.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (Table 4-1).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (Table 4-1).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table 4-1. See Appendix F for the evaluation form.

Table 4.1. Evaluation Criteria & Mean Response – Ten Planning Commission Workshops, Spring 2003

Evaluation Criteria	Number of Responses	Response (Mean)
Presentation		
The topics covered are timely	84	4.1
The information presented was useful	84	3.8
I learned something new	84	3.6
The presenters were effective	84	3.9
The computer presentation was effective	84	3.8
I will use some of the ideas presented today in my work as a planning commissioner	71	3.6
Discussion/Focus Group		
The discussion covered issues that are important in our community	92	4.0
There was enough time to discuss the issues	93	3.7
The facilitator did a good job focusing the discussion	93	3.9
The discussion generated some useful ideas	91	3.7

General project observations

A logical question readers of this report might pose is Was the project effective in achieving its stated goals? While we cannot provide a definitive answer to this question, we learned an enormous amount about the process of holding planning commissioner workshops, as well as other elements of the project. This section describes some of the strengths of the project and opportunities that exist for future activities. We do not include weaknesses because we feel that by and large, the project was worthwhile. The only recommendation we would make for future projects is to all sufficient time to organize and conduct workshops.

Strengths

- This project provided a wonderful opportunity for students to interact with the greater planning community. Rarely, do students have so many opportunities to hold discussions with planning commissions as well as seasoned professional planners. Being able to converse with a variety of people about a variety of topics is an

important skill for planners to acquire. The students' presentation and facilitation skills improved throughout the course of the project.

- Collaboration between the University of Oregon and Portland State University enhances student and faculty learning. Combining perspectives from the more rural focused UO program with the more urban focused PSU program creates many opportunities for learning and sharing of knowledge.
- The scope of this project was appropriate for the CPW model. Although the students had to research many new topics, they were not required to know technical details about specific communities. Students on the CPW team, however, found the project very challenging. At a minimum, it is intimidating for a graduate student to stand in front of a planning commission and discuss planning issues. Preparing for workshops requires quite a bit of time and energy – both of which graduate students possess. The CPW model operates with a project manager as the liaison with the client. This designation of a project manager was beneficial because there were many details to track.

Opportunities

- The students valued in-person interactions with the PSU team. More opportunity for the UO and PSU teams to interact would have been beneficial to the team members and the project.
- Planning and organizing the workshops required more time than was initially anticipated. If we had more time to research community issues, the workshops could have been better tailored to meet the needs of the communities.

Recommendations

We conclude this report with a set of recommendations regarding future technical assistance and outreach efforts. The recommendations were derived from the second Summit meeting and a subsequent follow up discussion with the advisory committee.

- **Create an inventory of technical assistance and outreach materials.** One observation commented on by both members of the CPW project team and many planning commissioners was that there is no inventory of ODOT/DLCD/TGM technical assistance and outreach materials. All three organizations have some materials posted on their web sites, however, none is comprehensive or organized in a catalog format or searchable database.
- **Develop a searchable database of smart growth examples.** This recommendation stems from repeated comments by planning commissioners concerning good examples of smart growth projects—

particularly in small communities. The TGM program should sponsor a project to inventory smart growth projects and post the inventory in a searchable database on their web site.

- **Expand outreach efforts to other target audiences.** While this project focused on planning commissioners, many commissioners suggested that the workshops be broadened to include other audiences: city councils, lenders, developers and retailers are a few examples.
- **Consider an expanded curriculum.** Many commissioners commented that they would find more intensive workshops helpful. TGM should consider developing curriculum that focuses on extended workshops and specific topics that communities are going through. Such workshops could be one or two days in length.
- **Integrate GIS modeling software into workshops where appropriate.** Emerging tools such as the Places software allow modeling of future policy decisions in real time. TGM should consider integrating modeling software into workshops to help underscore the benefits of transportation efficient land use patterns and smart growth.
- **Emphasize the use of smart growth principles as approach to achieve multiple planning objectives.** Smart growth includes principles that touch on many aspects of community planning. TGM should continue to emphasize the multiple benefits of smart growth principles in its outreach efforts.
- **Continue and expand workshops.** The workshop format used for this project—presentation, questions, and opening up for discussion—was appreciated by most commissioners. TGM should continue this workshop series and consider approaches to link workshops to specific planning activities in communities.
- **Consider innovative outreach approaches.** Approaches such as field trips, both facilitated and self-guided, video tours, and other methods can provide on-the-ground examples of transportation efficient land use patterns and smart growth principles. TGM should invest effort in testing such approaches.
- **Create a planning commissioner network.** This would be modeled after activities targeting practitioners by the OAPA and could include an internet mailing list, web page, planning commissioner day, or a planning commissioner conference.
- **Develop outreach materials on inter-jurisdictional coordination.** Inter-jurisdictional coordination ended up being a key issue—especially related to development in unincorporated areas within UGBs. TGM should develop outreach materials that help planning commissioners understand what options they have to coordinate development in unincorporated areas. One area of emphasis should be urban growth management agreements.

Appendix A

Summary of Informational Interviews

CPW performed a series of phone interviews with planning commissioners, public agency planners, and private planners to identify perceptions of smart growth, and potential opportunities and constraints to implementing transportation-efficient land use in Oregon communities. CPW used the informative interviews to help determine key issues to address in the community workshops.

Participants

The UO project team connected 14 interviews, those interviewed included:

Linda Berryman- Mayor, Medford

Tom Boyatt- Senior Regional Planner, ODOT

Steve Bryant- City Manager, Albany

Don Burt- Executive Director, Medford Urban Renewal Agency

John Boyd- Senior Planner, Douglas County

Scott Chancey- Senior Planner, Rogue Valley Transportation District

Mark Fancey- Senior Land Use Planner, Mid-Willamette COG

Matt Hastie- Consultant, Cogan Owens Cogan

Michael Jordon- Planning Commissioner, Clackamas County

Wendy Kroger- Planning Commission Chair, Salem

Mark Pangborn- General Manager, Lane Transit District

Mitch Rohse- Consultant

Elena Uhing- Planning Commissioner Vice Chair, Forest Grove

Alan Unger- Mayor, Redmond

This summary includes a summary of the key themes expressed in the interviews and detailed notes from each interview organized by question.

Summary of Themes

Smart Growth

When asked to define smart growth, each interviewee had a different definition of this term. People's emphasis when describing the definition

generally correlated with their job position. For example, those working for an transportation agency, viewed smart growth with a transportation focus, while the people working for a city or private consultant described smart growth with another focus such as housing or sustainability. One respondent stated that the term ‘smart growth’ is a divisive issue in Oregon that cannot be translated on the ground. Commonly expressed smart growth elements included:

- Links transportation and land use planning
- Encourages community redeveloped
- Promotes better use of infrastructure
- Limits impacts on natural resources and supports the broader community
- Provides transportation options
- Encourages long range planning
- Promotes livability
- Promotes sustainability - in terms of community’s economy, environment and social structure

Tools to Integrate Smart Growth Principles

Part of our task for this project is to find out how local jurisdictions can better integrate smart growth principles into their transportation and land use planning. There are many planning tools that are available for local jurisdictions to use including policy, technical and educational tools.

The respondents identified the following policy tools:

- Statewide planning goals
- Comprehensive plans
- Refinement plans
- Ordinances and development codes
- Public education and outreach
- Neighborhood plans
- Transportation system plans
- Strategic planning
- System development charges
- Environmental policies

The respondents identified the following technical tools:

- Transportation Growth Management Program
- Global position system
- Geographic information systems

The respondents identified the following educational tools:

- Lectures
- Workshops
- Fieldtrips

Successful and Unsuccessful Tools

We also wanted to find out which tools have been successful and unsuccessful for integrating transportation and land use planning. One participant insightfully stated, “Like any tool, if you don’t know how to use it correctly, it will not work.”

The successful tools that were mentioned included:

- Comprehensive plans (with good policies in place)
- Promoting alternative transportation modes
- Density incentives
- Strategic planning
- Urban growth boundaries
- Case studies in Oregon
- Oregon Downtown Development Association
- TGM Program
- Neighborhood plans
- System development charges
- Environmental policies

Unsuccessful tools included:

- Refinement plans that do not comply with comprehensive plans
- Confrontational political climate
- Incentives for development that create bidding wars
- Ordinances that encourage greenfield development
- Exclusionary zoning

Barriers to Integrating Land Use and Transportation Planning

The interviewees have a variety of experience with land use and transportation planning. The greatest obstacles/barriers to integrating land use and transportation planning included:

- Political mistrust/disagreement
- Market demands are leaning toward suburban subdivisions
- Lack of transportation financing for all modes of transportation

- Public perceptions and lack of wanting to change
- Regulations that do not allow the principles to take place on the ground
- Built infrastructure that promotes more development
- General bias toward automobiles
- Lenders not loaning money for smart growth development
- Lack of funding for long range planning
- Ordinances that do not allow smart growth strategies
- Difficulty educating citizens about benefits of smart growth
- Lack of money
- Developers not wanting to try new ways of developing

Desired Technical Assistance

All respondents indicated that there is a need for more technical assistance and outreach to planning commissioners. Suggestions for technical assistance included:

- (1) Conduct planning commission workshops on the following topics:
 - New member orientation - make sure new members have a basic understanding of Oregon planning system
 - Density and urban form - what good examples look like
 - Case studies of smart growth development
 - UBG expansion
 - Market and how it controls development
- (2) Create planning commissioner network
- (3) Hold field trips to expose commissioners to good examples of smart growth development.
- (4) Distribute short written materials
- (5) Conduct planning commission conventions

General Comments

At the end of the interview, respondents were given an opportunity to provide general comments about transportation and land use planning and smart growth. Their comments included:

- Nodal development is a good idea that needs to be tested more.
- Appropriate densities are community specific.
- Local control is a huge factor in implementing smart growth.

- Advocating smart growth without politicizing the issue will help the public accept the concepts.
- We need to increase public awareness about planning.
- Smart growth is an integral part of Oregon planning; more flexibility is needed to apply principles to rural growth management and economic development.
- We need to increase communication between state and local levels.
- Planning commissioners would appreciate more convenient workshops.

Summary of Responses by Question

The complete responses from the informational interviews are listed in the following pages.

1. How would you define smart growth?

- Smart growth recognizes the benefits of growth that allows communities to be restored and redeveloped. Smart growth focuses on new developments in self-sufficient town centers or nodes that are multi-modal (auto, transit and pedestrian). This concept utilizes a mix of housing, commercial and retail uses to increase density and decrease dependence on the automobile as the primary mode of transportation. Another goal is the preservation of open space and protection of sensitive areas such as wetlands. Protection of open space and increasing density provide a connection between development needs and quality of life issues. Smart growth is a philosophy of quality planning. It is a tool for guiding change with long-term benefit for communities.
- Smart growth focuses on well-planned development that includes lots of community involvement. It focuses on multi-modal transportation options, higher level of densities and less sprawl.
- Smart growth focuses on the maximization of current infrastructure. This includes the effective use of land and transportation systems and utilities. You have to understand the connections between all the components like the state goals and how they play together.
- Smart growth is development that limits impacts on natural resources and supports the broader community (i.e. livability, sense of community, housing options, connections between land use and transportation).
- There are two elements to smart growth: One element is sustainability. Development and growth should proceed in a sustainable manner in terms of the community's economy, environment, and social structure. The second is growth that

eliminates the rule of unintended consequence. Proper planning should be well thought out to remove impacts and problems in the future.

- Smart Growth consists of several elements:
 1. Development should be consistent with each community's values and needs.
 2. Efficiency element – growth and development should support the cost of infrastructure (development should not outgrow infrastructure).
 3. Implementation of land use and transportation systems should support and be in balance with each other.
 4. Compact growth – eliminate sprawl wherever possible through revitalization and redevelopment.
 5. Sustainability – long-term growth needs to occur without depleting a community's resources (i.e. energy, natural resources).
 6. Economic balance – maintain economic strength while eliminating needless sprawl.
 7. Mix of land use – mixed-use development to promote alternative modes of transportation.
- Smart growth is the utilization of new principles developed in recent years that explain how to integrate land use and livability objectives. The principles have been developed through research and case studies showing how to create compact growth, multiple modes of transportation, and more efficient transportation. The key principle of smart growth is connecting residents to their communities so that they are more in touch with each other, thereby building a sense of community.
- Smart growth is a concept that describes how we grow as a region. This growth that is livable and provides a sustainable infrastructure, jobs, affordable housing and an intact environment with transportation choices.
- Smart growth is efficient use of land and resources that reduces reliance on the automobile. Smart growth is an abstract concept that cannot be translated on the ground. There are limited examples across Oregon. The Fairview example in Portland is a one-time example, which is overused to exemplify smart growth.

Smart growth implies that up until now we have been doing dumb growth, which is inaccurate. Both the term and concept of smart growth is a divisive issue in Oregon.
- Smart growth is a community decision about linking growth to adequately sized transportation infrastructure and other related planning issues. Smart growth needs to be a systemic approach. It is

a statewide process (i.e. SB100) that identifies what resources we have. The community decides on what is ultimately best for their land and resources, and then applies this vision to what already exists. It is the linkage between population, transportation needs and transportation infrastructure. Smart growth works for people and it offers more than a single mode of transportation.

- Smart growth is defined by the amount of land supply communities have to develop. The 20-year land supply is counteractive to smart growth. To achieve smart growth, the buildable land supply inventory should include less land and more redevelopable land. HB 2709 has more information on this.
- Smart growth promotes efficiently integrating transportation and land use as well as livability. The comprehensive plan should include sustainability elements. Smart growth ideas have to be supported by the community.
- This is a term that has been used in many ways. It is growth that builds on existing growth that leads to better use of infrastructure and addresses the comprehensive plan vision.

2a. What planning tools are available for use? (i.e. policy tools, technical tools, educational tools)

- Generally, the Oregon land use system has utilized smart growth concepts since the onset of the program in the late 1970's. Lately, DLCD has provided many educational and technical manuals for use in planning: *Planning for Narrow Local Streets*, *Planning for Sidewalks on Local Streets*, *The Infill and Redevelopment Code Handbook*, and *Main Street- When a Highway Runs Through It*. There are no rural tools that compare.
- Tools include Metro planning office, regional transportation plan, transportation system plan, transportation planning rule, federal regulations related to planning. APA is a really good source, as well as Transportation Cooperative Research Program (TCRP), and Center of Urban Transportation Research.
- One tool is the comprehensive plan. The plan is comprehensive, long term and a vision of what you want. It takes the vision to get where you want. Projects are a different story- they need to fit into the comprehensive plan.

Small support plans like the transportation plan is one tool for to achieve the vision.

TGM is a good tool but some of their projects are out of context.

Vertical housing tax credit, urban renewal/ TIF and state historical tax abatements are also good tools.

- All three types of tools are available for use (policy, technical, and educational). Policy tools include the statewide land use planning program and its requirements for comprehensive plans, zoning ordinances, and subdivision ordinances. Education materials include any publications or literature created by agencies on the topic. Most agencies have some information. METRO has a lot.
- A policy tool creates a goal or vision through strategic planning for the kind of community that is desired by all the citizens.

An educational tool needs to involve as much of the public as possible throughout the strategic planning process.

Technical tools are system development charges and environmental policies.

- Public education and outreach tools are important. Smart growth will not occur in any community until planners find out what the local public thinks and needs. There is a need to engage local public.

A strong planning program is also an important tool; communities need to have enough funding for long-range planning efforts.

Communities need innovative implementation techniques to develop smart growth principles that are specific and match the needs and thoughts of the local citizens (i.e. tax incentives, changing code).

- Technical/educational tools are widely available especially through TGM. *Design Principles*, *Skinny Streets*, and *Building on Small Lots* are examples. The manuals help explain why smart growth is beneficial. In addition, the planning departments in many communities have case studies of developments that exemplify smart growth (i.e. West Bend Village). A specific example comes out of the City of Albany. As the city was updating the comprehensive plan and zoning code, the planning staff used the *Skinny Streets Manual* help convince the city council to change the code in specific instances to allow for narrower streets (a smart growth principle).
- Policy, technical, and educational tools are all available for use. Examples of policy tools are functional plans, codes and ordinances, comprehensive plans, transportation master plan and the goals outlined in the 2040 Metro Plan. Technical tools available include mapping tools such as GPS and GIS, metro's mapping staff, the MTIP (MetroTIP) manual. Educational tools such as speaker series and workshops are available. One recent speaker series consisted of staff from ODOT, Metro and the University was very useful in that it provided a regional perspective. Similarly, a recent workshop was set up as a joint work session between city council and planning commissioners which focused on how to put laws in place. A land use attorney was present to assist with legal decision-making skills and to explain the impact of land use legal decisions.
- I do not use any planning tools to achieve smart growth in the communities that are under 3000 people. Since these are such small

jurisdictions, I do not feel that smart growth principles apply. Small communities have standard codes for their subdivision developments, which do not include alleys or other aspects of smart growth. The only area where smart growth is remotely practical for rural communities is in changing the codes that make provisions for recessed garages to discourage “snout” houses.

- Policy tools are the most available and successful tools such as LCDC’s statewide planning land use goals. One example is the current goal to reduce vehicle miles traveled.
- Mostly policy tools are available for communities for implementing smart growth. Local jurisdictions can weave their refinement plans, such as TSP’s, into the comprehensive plan. Other tools include land use ordinances and development codes. These guide transportation efforts. A federal policy tool, such as the designation of the Columbia River as a National Scenic Area, restricts urban development in scenic areas.
- There are not enough planning tools available. Jurisdictions need all three (policy tools, technical tools, and education tools) to implement smart growth. Education is the first priority. The political agenda at the local level needs to be removed. Long-range tools are very helpful for smart growth, like Salem Futures.
- The planning tool that has been most successful is education. The concept of coordinating land use and transportation to produce a better result is not terribly intuitive. If it was, it probably would have been done a long time ago. Education, to help understand what can be done and how to do things better, is paramount. Without the understanding of these concepts, it isn’t possible to even create the plans to carry this out. Creating the plan takes a close second as a useful tool. All of the concepts have to be embodied and coordinated in the plan.

The part that creates difficulty is the fact that all of this development is regulated by codes and regulations. The programs and plans to integrate land use and transportation require some innovation that is not typically allowed in the standard development ordinances. This includes mixing uses, restricting some parking and creating new types of streets that are more pedestrian friendly.

- The best tools we have for integrating land use and transportation are in the creation of neighborhood or broader plans. A good example of this is Medford’s Southeast Plan. The Southeast Plan contains policies and land use patterns that work to reduce vehicle miles traveled. This is done though concentrating higher density development around a central core that includes commercial services and transit. The development is then coordinated so that people can easily move throughout the development in all modes, vehicle, pedestrian, and bicycle.

Educational tools help in developing the concept of the plan in the first place as well as getting the public to understand and support the concept.

The broadest plan Medford is developing to help integrate transportation and land use is the City's Transportation System Plan (TSP). This plan will contain citywide policies and coordinates the city's transportation system with both county and state systems. The TSP also contains plans for four Transit Oriented Development sites in Medford. The Southeast Plan is one of the four sites. The other three will be developed under the same general concepts as the Southeast Plan. The TSP will also contain policies about locating higher density development along transit corridors to make them move accessible to those who need transit services. Overall, the policies of the TSP will very much help coordinate land use and transportation.

- All tools are available; the challenge is to access the information available because of work load problems with staff. It is also a challenge to anticipate the future desires of developers and buyers.

2b. What planning tools have been most successful? Why? Unsuccessful? Why?

- Oregon planning with emphasis on urban growth boundaries has proven successful in the protection of farmland and refocusing growth in centralized areas. These boundaries provide a twenty-year supply of residential, commercial and industrial lands for the redevelopment and expansion of urban areas. Rural communities have provided incentives for increased densities for residential and commercial nodes providing housing and services for rural and resource areas.
- TGM program is the most successful tool for integrating land use and transportation. They are the ones that fund planning work that incorporates smart growth in the local programs. There are no unsuccessful tools. Some are better than others, but I can't single out the most successful. There are some good in all programs.
- Zoning, comprehensive plan, and neighborhood master planning are successful tools. The comprehensive plan tells you what you need to do, the neighborhood plan refines it and zoning makes it happen. If you know where you want to go it is easier to get there. If you don't know, what is the use? All the above tools are also unsuccessful. Like any tool, if you don't know how to use it correctly, it will not work.
- The statewide land use planning program has been very successful at reducing impacts to farm and forest land. Growth and its impacts have mainly been contained within UGB's. ODOT has been successful in some areas (usually larger cities) at promoting alternative modes of transportation. ODOT and various other local

jurisdictions have also been successful at forcing people to use existing transportation systems and alternative modes by not funding new roadway projects.

The statewide planning program has not been successful at reducing adverse environmental impacts within UGB's.

- An example of a successful tool is policy or creating a goal or vision through strategic planning for the kind of community that is desired by all citizens.

More educational tools are needed to involve as much of the public as possible throughout the strategic planning process.

Technical tools that are successful are system development charges and environmental policies.

Visioning tools, like strategic planning, public awareness, and involvement are also good tools for communities.

Unsuccessful tools for smart growth are exclusionary zoning and other code related tools because it is often tough to get the community to buy off on radical changes in the code and zoning ordinances.

- Successful examples of smart growth include Sandy, Corvallis, Springfield, and Eugene. These communities place emphasis on early/initial community involvement and outreach.
- Policy planning tools such as TRANSPLAN guide two different political systems such as the metro areas that serve Eugene and Springfield and have been successful in getting the two jurisdictions to agree on complex issues. One example is how Eugene and Springfield agreed on the Road Tax or New Transportation Fee Tax.

However, the two political jurisdictions do not agree on other policy related issue such as edge development. An example is how Eugene strongly opposes edge development and denied PeaceHealth land to develop on the fringe of the city while Springfield offered a similar location on the edge of its city limits for PeaceHealth to develop. The lack of coordination between jurisdictions on state policy contributed to different policy perspectives locally. This is an example of the planning policy tool being used unsuccessfully.

- Policy tools have been most successful because local jurisdictions have the ability to amend comprehensive plans through implementation of refinement plans.

Policy tools are unsuccessful because of political will, federal or geographic constraints, lack of time and resources, and cultural limitations. Federal and geographic constraints refer to how different jurisdictions cannot overcome limitations while others, such as Ashland, which has many resources (money and an educated public), can overcome such limitations. Other places, such as Springfield, perceive policy tools through an economic lens and in

their actions are “open for business”. Financial and cultural limitations to policy tools refer to the many Oregon communities where the majority of residents are of retirement age with a set of political beliefs, fixed incomes, and are not partial to growth management ideas.

- On the ground examples are the most successful tools. People need to go see projects that incorporate smart growth elements and have been built. They have started in Portland and Eugene then moved to Medford and Ashland. Another good tool is the Oregon Downtown Development Association. A downtown is a centerpiece for a community. An example of an unsuccessful tool is the greenfield development on the edge of the UGB's and city limits.
- Having the right policies in place is important so that you can promote the type of development you are looking for. Using incentives to attract the growth that you want is difficult because you lose the value of what the incentive is and you have to compete with all other communities. It becomes a bidding war and everyone loses.

2c. What are the greatest obstacles/barriers to integrating transportation and land use planning (e.g., smart growth principles)? These barriers can be regulatory, financial and/or educational.

- Existing growth patterns and population growth can impact the ability of smart growth to be effective. Lenders are hesitant to lend on new mixed-use development if there is any controversy, for example introducing mixed uses in primarily residential areas.

Conversely, bringing residential uses into developed commercial areas can be negatively viewed by transportation agencies. Mixed uses increase average daily traffic. While the goal of mixed use is to promote people living where they work, the reality is people live where they want to recreate and travel to work. Thus, the higher the density of an area, the greater the average daily traffic and the greater the impact on infrastructure.

Grant funds for economic development provide dollars to expand water or sewer services. However, for communities needing to replace existing systems such as failing lines or upgrades for plants at capacity, typically the only form of funding is low interest loans. These communities must increase rates to offset the cost of loans. The increased rates can be a disincentive to growth.

- Public perceptions are a barrier for smart growth. A lot of people agree with smart growth. The way it is presented, people often take offense at smart growth in the beginning because it does mean change and shaping change. People perceive that the government is telling them what to do with developing land. It will take time to break through the perception.

- The obstacles depend on the type of smart growth that you are taking about. It is about the engine that drives the train. Without the understanding of the market place, you can't implement smart growth.
- Regulatory barriers have been established around people's personal preferences that often do not coincide with smart development principles. People want to have choices about where they live. Not everyone wants to live where they work. Education can also be a major obstacle because people, especially in rural areas, do not want to hear that they should be doing something different. This is especially true when the message of smart growth comes from urban planners.
- Money is the largest obstacle. If there is enough of it, anything can be accomplished. Infrastructure is also a large obstacle because if it is in place, it is tough to slow development around it. Another obstacle is the general bias toward the automobile. Americans love the freedom they have in their cars.
- Political mistrust and disagreement are the largest obstacles. Two or more sides are busy with their own interests rather than discussing the joint benefit of smart growth (i.e. conflict between businesses and no-growth or homebuilding associations and neighborhood associations).
- Education is the largest barrier for two main reasons. The first reason is because there is constant turnover within city councils and planning commissions. Therefore, re-education is a constant need. The second reason is because of the negative perception of high density among the majority of citizens in Oregon. Most citizens feel that high density leads to higher crime and congestion and lower property values.
- Financial or economic barriers are the primary obstacles to integrating transportation and land use planning. This is especially an issue when it takes such a long time to obtain funds (or not receive funds at all).
- Another barrier is the community itself, where the same group of 50 to 70 people (in a town of 18,000), are always involved in community issues. The result is not a variety of opinions from the community and limited input from the community as a whole. This community has one of the largest elder communities in Oregon so attendance at public hearings consist of one-third retired folks, one-third business people, and the rest a mix of old and new citizens.
- The main obstacle to integrating transportation and land use planning is that people are not ready to throw out old ways of development for smart growth development because it isn't practical or cost effective.

- Political subdivisions in metropolitan areas (i.e. River Road / Santa Clara) create problems. While local MPO's can make progress, the county often relies on state laws and not local planning agent decisions, which have exhibited progress.
- The greatest obstacles to integrating transportation and land use planning are primarily economic and the political will of landowners and developers. While the barriers are financial, the regulatory plans in Oregon are on the right track and serve as a good toolbox for planning professionals, commissions, and city councilors. A good example of integrating land use and transportation is the 1999 Oregon Highway Plan. LUBA has supported ODOT recently and is another good example. The fact that the land use system is "fairly flexible" is good and bad since local jurisdictions have the right to interpret codes. Public barriers refer to the "perceived cost" of smart growth development on behalf of the state, staff, and planning commissions. Private barriers refer to how developers know one way to develop and the perception that mixed-use development is costly.
- At the local levels the planners are stuck working on current planning with old ordinances that don't meet today's needs. Staff has no time to update those ordinances and they lack funding to hire a consultant. The planning commission can only ask developers to do so much without the ordinances backing them up. It is time for updates and a change in the process. Also, there is a need to sell the idea of smart growth to those that are involved in the process.
- The greatest obstacle to integrating land use and transportation planning has to do with understanding and supporting the concepts. Our culture has grown up with cars and that makes it very difficult to get people to not always put cars first when designing development projects. Many drivers even hold a negative view towards bicyclists and pedestrians. Development projects are almost never viewed from, or give priority to, the pedestrian's standpoint. They are almost always developed to make driving vehicles the most efficient transportation option at a significant cost to bicycles and pedestrians. Yet when we go to the best places to visit, it is usually because they are very pedestrian friendly. Once these concepts are better understood, through education or experience, the regulations, and financial institutions will follow along accordingly.
- Regulatory requirements add costs to city departments which stop changes in planning. An example is the requirement to have traffic studies for all zone changes. The study will look at the worst case scenario and put requirements on the zone change that are too costly, therefore the zone change is abandoned.

Financing is another barrier. The requirements to handle transportation needs can be a lot. The city must decide who is going to pay for the changes that need to get done. Many cities do not have

the funds and the developer only wants to pay for his impact. How long does one wait for more development to pay the rest of the costs?

3. Do you think that more technical assistance and outreach would enable planning commissions to better understand and implement smart growth principles, specifically related to transportation and land use? If yes, what kind of assistance and outreach is needed? What would be the ideal format (i.e. short workshops, manuals, more information on the web)? If you had to prioritize, what do you think would be most effective?

- The most effective outreach method is manuals and information. Workshops offered to explain the concepts may be helpful. The prioritization of effective assistance is: provide education information, have trainings on the information provided, and provide grant funds to implement the smart growth elements.

To be accepted locally, each jurisdiction must have the freedom to incorporate the smart growth principles that will be effective for their specific area.

- In small cities there is a misunderstanding about the role of the planning commission and what they can and cannot do. New planning commissioners expect that they can show their own opinion about development and will not follow the codes that they are governed by. They need technical training about their role and what they can and cannot do. They also need to better understand transportation planning. They are disconnected between their local and regional role. The ideal format for this is to have someone, perhaps from DLCD, to come to each planning commission and lecture to the commissioners. Workshops should cover their role, how it fits in to the bigger picture, and what they need to consider. The workshops should allow time for questions and answers.
- Education is always good since it continually changes. The more the better. We need to focus on three categories, design related to smart growth, zoning, and the market. What is the development community looking for? What are they willing to do and not do? Provide 'Smart Growth 101' as a workshop. Provide a broad overview and then breakdown the three categories of designs for smart growth, zoning and the market.
- Education is important, but you need to be careful in rural areas. Not all planning commissioners, especially in rural areas, are open to big change. Preaching should be avoided – outreach activities should remain in a format that is simply to share information. Presentations can be effective during regularly scheduled planning commission meetings. Try to avoid scheduling meetings outside the commissioner's regular sessions.
- County and medium sized cities could benefit from increased training. Large cities are typically already aware and are already

implementing smart growth. Small cities usually do not care or do not need smart development. Any method that allows face-to-face interaction is the best format to use (i.e. seminars).

- Most communities simply need to allocate more of their funding toward outreach and community involvement and less on plan development and research. Proper solutions can often time come from community consensus, not from research of what has been done in other areas. People controlling the purse strings in the community often do not allocate enough money in the budget for outreach. Planning budgets should move toward more of an equal split between research/planning and outreach.

Second, more money should also be allocated toward the distribution of finished educational information into the community so that they do not end up simply collecting dust on the shelf.

- Outreach/education is the key. The most effective form of outreach would be to use field trips. City councilors and planning commissioners should be taken to examples of successful smart growth in Oregon. Slide shows/PowerPoint presentations are second and architectural renderings are the third most effective educational styles.
- More outreach would enable planning commissions to better understand and implement smart growth elements. However, federal and state outreach efforts need to be in tandem with current issues and projects otherwise there is a disconnect in the learning process for commissioners. Outreach at the beginning of a policy change is preferable rather than what typically happens which is Metro gives outreach materials two or three years after a federal or state policy is enacted.

The kinds of materials needed are accurate shorter manuals. For instance, the commissioners were asked to review a state document that is 300 to 400 pages of technical information, which a few commissioners felt was full of inaccuracies. More technical assistance in the format of a “speaker’s series” is required. These workshops should be geared toward individual communities. Speakers should specialize in the field they are speaking about, i.e. transportation, demographics. One way to have rural or regional input is through the new program called “Metro’s Subregionalization”. Metro and rural areas are very different economically and terms of land structure.

The Web works for only one segment of society- those that are hooked up. Not all members of the Forest Grove community, especially the economically poor community, are hooked up to the Internet. The web is not inspirational and not a good way to involve the public because it’s not a good medium to debate issues where people can reveal their passionate true feelings. Face-to-face meetings do this much better.

- Planning commissions do a great job for being regular people not planning professionals. They just do not have the time for technical assistance or outreach to learn about the complexities of planning.

The best way to educate planning commissions is by having workshops, yet incentives are needed to get the planning commissioners to come, such as financial and convenience. 'Planning Commission 101' type workshops could educate new members and 'Planning Commission 102' could be a cross fertilization between other planning commissions, other jurisdictions and other planning professionals where they come to a common understanding on two or three complex issues.

- The focus should be on the land use side and center around technical assistance with an emphasis on density and urban form. This is because transportation typically follows along the land use spectrum. In Oregon, transportation follows density, so if you can control the land supply (i.e. UGBs) than you can control the integration of land use and transportation. More education is needed to inform the public on how expanding UGBs actually works against smart growth principles and that "setting UGBs in stone" could result in cost savings for transportation infrastructure.

With regards to educational materials, in-person presentations using case studies and educational materials followed up with workshops are the most effective formats. The workshops should inform the public on the complexities of local and regional issues, such as the divergent policy paths that Springfield and Eugene have chosen to follow. For instance, by Springfield developing and investing in the edge of the city while Eugene and some Springfield advocates focus on revitalizing their downtown centers, the net effect is the dilution of downtown efforts.

- Workshops, that educate the decision makers, such as planning commissioners, seem to be one of the best ways of helping people understand these new ideas. It is also helpful for them to be able to carry away printed documents that they can later use as reference for what they learned. Technical assistance has also proven valuable when developing the specific plans that implement these concepts.
- Technical assistance would be great. The more knowledge that one has when they put the policies and codes together the better they can be. Ideas that look great on the west side of the mountains are not always good ideas on the east side of the mountains. Our resource land is usually within UGBs on the east side but the laws require bypasses to be inside where land costs are greater. Redmond is constructing a reroute of Highway 97, two thirds of the cost is in roadway and utility relocations.

All the formats are good; I would add 'ask the experts' so that specific questions could get specific answers.

- Slide shows/PowerPoint presentations work especially well because a picture is worth a thousand words.
- Workshops that are interactive with assignments are more successful than passive workshops that require participants to sit and listen. Recent examples include the workshop the planning commissioners attended, entitled “How to properly run a legal hearing” and the “Metro Let’s Talk” workshop, which was a two-day regional conference in the Portland Metro area. Because large technical manuals tend to stagnate the group process, these types of educational tools are unsuccessful planning tools for small town’s planning commissioners.

4. Do you have anything else related to the connections between land use and transportation planning, and more broadly smart growth, that you would like to share with me?

- Over the past ten years there has been a growing emphasis on protecting statewide infrastructure at a cost of reduced local control. For smart growth to be accepted, local governments must be empowered, not forced to apply smart growth techniques.

The philosophy of smart growth is an integral part of Oregon planning, however we do not have the flexibility we need to apply many of the principles to rural growth management and economic opportunities. Smart growth concepts need to be made into real tools for rural Oregon. The principles do not have to be just urban!

- We are making progress to increase local control of transportation and planning. We need to view it at from the staff to the elected official level. Also, we need the voting public to be informed and buy into it. They are the ones who elect officials to make the decisions and have the power to take elected officials out of office. Ashland has a better understanding than Eugene. There are people within Ashland that complain about planning commission decisions. The people that are against growth would not be here if there was no growth. They need to understand this and how no growth is bad for the economic perspectives. How do we get there? Don’t know, but by continuing to teach.
- Transportation drives land use, it needs to be turned around.
- League of Oregon Cities has some great reference material.
- A key question that needs attention is how to advocate for smart growth without politicizing the issue. Planning agencies must have individuals who are willing to advocate for smart growth without taking the easy road of political neutrality.
- We need to show city councilors/planning commissions/general public that smart growth isn’t just a phenomenon in Oregon – it is international. Smart growth has been developed as a better method

for planning communities by planning professionals through practice, research, and data collection. In addition, smart growth fits into the Oregon land use system (statewide goals).

- Many regional meetings are outside the area (i.e. Trimet) and so commissioners and citizens are unable to attend. To increase involvement, these types of meetings should be more accessible and convenient. One solution is to divide the meetings into one large meeting held in the metro area followed by weekend workshops closer to home.

There is a need for a long-range master plan for communities that includes visuals such as maps showing what is going to occur in the next year, within three years, and within five years. The problem is that simulation and mapping tools are expensive. There is a need for this because now they rely on Metro for such information, yet they are useless since they follow 'bad protocols'. For example, shading in color with lots of symbols is not as helpful for commissioners to read as simple black and white shading.

- Those that have similar perceptions on the smart growth concept, characterize TGM as "true believers". Advocates of smart growth are not critically looking at the concept's ability to produce projects on the ground.
- Nodal development is a good idea and when combined with new development the transportation infrastructure should be created around where people live, work, shop and recreate and done in a way that minimizes negative impacts of growth.

If development is concentrated with the UGB, we must decide how to maximize the quality of life and minimize negative impacts

We are on the right track, yet the education of citizens on smart growth principles is needed especially with the new residents locating here from California that primarily use a single mode of transportation across town (i.e. frequent trips from south Eugene to Costco). Perhaps educating them on other modes available and showing the negative impacts associated with using a single mode of transportation will begin to influence them.

With regards to nodal development, try it, test it and find the places where it works then expand it out.

- I am looking forward to the day when there is a light rail connecting the north to south of the Willamette Valley, and there is a line to the coast.

We need to find the tie that links transportation to brownfield development.

The sustainable group created by the last governor needs to tie into smart growth. We need more state level communication.

- Redevelopment should occur at higher densities; this includes large parcels to be divided into smaller lots, as ownership changes.

As new development occurs, the full cost of the growth should be paid by the new development.

We need to have public transportation that serves rural and urban residents that is run at an affordable cost. We should stay away from the red tape federal money

Grant funds should fund the planning of where and how the community will grow, not the developers.

Additional Information:

- The City of Tualatin, Oregon has a great example of smart growth called the Tualatin Commons in the downtown area. The Mayor of Tualatin has a presentation on how to overcome the many obstacles that arise when promoting smart growth.
- The City of Albany may have information on the focus group method they used to promote smart growth through their Great Neighborhoods Program. Helen Burns-Sharp in the planning department is the contact (541) 917-7555.

Appendix B

Minutes of Advisory Committee Meetings

The UO and PSU facilitated four Advisory Committee meetings during the project. The Advisory Committee provide both the UO and PSU teams with direction on specific issues throughout the project. This appendix presents the Advisory Committee meeting minutes.

Meeting 1: February 13, 2003

The first Advisory Committee meeting was facilitated by Bethany Johnson of the UO. The UO also prepared the meeting minutes.

Purpose

The purpose of the meeting was to: 1) educate advisory committee members about the project description and scope of work; 2) finalize questions and list of interviewees for informational interviews; 3) brainstorm potential topics for educational material; and 4) discuss the content for community workshops and develop a list of potential communities for the workshops.

Attendees

Bill Adams, TGM

Bob Sherman, ODOT

Jon Holan, Community Development Director, Forest Grove

Michal Wert, MW Consulting

Eric Jacobson, ODOT

Steve Johnson, PSU

Jennifer Dill, PSU

Bob Parker, UO

Rachel Warner, UO

Bethany Johnson, UO

Key Outcomes:

- A list of people to interview was created.

- Interview questions were developed and are attached for your final review.
- Topics for the educational materials were developed. Bob Sherman, Bill, and Eric (the internal work group) will begin to prioritize the issues.
- We will not include the entire “Telling the Oregon Story” powerpoint in the community workshops.
- We will “customize” local workshop agendas based on conversations with Planning Directors or City Administrators.
- We will invite City Councilors and other local stakeholders to participate in the workshops.
- A list of communities in which to hold the workshops was created. The internal workgroup will begin to prioritize the issues.
- Future meeting dates were proposed. See page 4 of notes.

Homework:

- Review interview questions and email Bethany feedback by **Thursday morning, Feb. 20th**
- Add to potential community workshop list if you think of another place we should go
- Review proposed meeting schedule and let Bethany know if it will work for you

I. Project Description

Bill Adams and Bob Parker gave a brief overview of the project’s history and scope of work. TGM initiated this project to determine the best ways to help communities support smart growth principles in their transportation planning efforts. According to the DLCD Technical Outreach and Needs Assessment Project, which was completed last year by the University of Oregon, many planning commissioners lack knowledge about the state’s land use planning program and are not aware of the technical resources available to them. These commissioners could benefit from more outreach and technical assistance.

The TGM UO/PSU project has two goals. One is to inform planning commissions about smart growth principles and best practices that are occurring within the state with a particular emphasis on transportation-efficient land use. The second goal is to identify the opportunities and constraints local governments deal with while implementing smart growth in their communities. The project is about implementation of policy, not creating policy itself.

The TGM UO/PSU project consists of 4 main activities:

1. Interviews with people knowledgeable about smart growth and transportation and land use planning
2. Development of educational material to distribute to planning commissioners and other lay people
3. Workshops in communities with local governments (i.e. planning commissions) focusing on barriers to implementing smart growth principles
4. Summits that will allow PSU and UO students and other planning officials to process information gathered in workshops

The project will end with a final summary report.

Jon noted that OAPA provides training to local planning commissions. The OAPA offers a general training about basic planning concepts, whereas our workshops will specifically concentrate on the intersection of land use and transportation planning. OAPA is also involved in distributing the “Telling the Oregon Story” powerpoint. This presentation is also more general than that which we will produce.

II. Interviews

The purpose of the informational interviews is to ask people knowledgeable about smart growth about their experience integrating transportation and land use planning. These interviews will help produce topic areas for the workshops.

Interviewee Selection

A potential list of interviewees was distributed. Advisory committee members were asked to add additional names to the list. It was decided that a cross section of planners/agency sector/developers/activists/other officials is desirable. More planning commissioners need to be added to the original list. Bob Sherman suggested including city council members and transit districts members.

Interview Questions

Potential interview questions were distributed for review. Bill suggested focusing the questions to get more detailed information. He re-iterated that we must have a transportation focus in this project.

Everyone agreed that the term smart growth is very broad and many people have different interpretations of it; therefore, it was decided to include a question about the definition of smart growth in the questionnaire.

Specific question comments included:

- Michal suggested including the following questions, “What planning tools are you using? (i.e. policy tools, technical tools, etc.). Which tools are successful/or not and why? What tools are available that you’re not using and which tools would be helpful?”

- Jennifer suggested asking about helpful formats for technical assistance and outreach.
- Steve thought that it was important to ask respondents to identify barriers.
- Jon suggested framing the questions for city councilors as well as planning commissioners.

There was a lot of discussion about the appropriate method for interviewing. Michal suggested sending materials to the interviewees prior to the interview. Other committee members agreed. Bob Parker reinforced the need to begin the interview process quickly and felt that sending out pre-information was not necessary. The committee members agreed that an email with a little information about the project sent to each person we want to interview would be sufficient.

c. Action Items

- A revised set of questions will be developed and distributed to the committee for final review.
- All recommendations for interviewees will be incorporated into a master list from which PSU and UO will select people to call.

III. Educational Material (briefs, fact sheets, case profiles)

A handout was distributed describing the three types of educational material to be produced. Members were asked to brainstorm topics for briefs, fact sheets, case profiles. (See attachment.)

Action Items

- The internal work group (Bob, Bill, Eric) will begin to prioritize topics for each type of educational material.
- More discussion about educational material topics will happen at the next advisory committee meeting.

IV. Community Workshops

The purpose of the community workshops is to educate the local planning commissions about the importance of integrating land use and transportation planning, to identify barriers to implementing transportation efficient land use, and to identify how ODOT and DLCD can better help communities implement Oregon's transportation rule and TGM principles.

We need to clearly define what niche we are serving because there are lots of organizations trying to help communities. Michal suggested contacting the Community Solutions Office to see what they are doing and how/if they can be involved.

a. Workshop Content

Jon thought that it might be helpful to have background discussion with the planning director prior to holding each workshop. Bob Parker agreed that conversations with planning directors are critical to the process. We want to know what the issues are in the each community so that we provide a meaningful workshop. The powerpoint presentation should be customized to fit the needs of each community.

Michal stressed that the benefits of smart growth should be framed in lay terms and not as meeting regulatory requirements.

The scope of work outlines that we will include the powerpoint, “Telling the Oregon Story” in the community workshop. Jon agreed that this powerpoint is educational, but is not sure how critical it is to the content of the workshop. Perhaps parts of it can be assimilated into the powerpoint developed by UO and PSU.

The community workshops will be targeted to planning commissions but other people, such as city councilors, will be invited to attend.

b. Community Selection

Bob Parker presented rough criteria for community selection:

- population distribution
- geographic distribution;
- areas where there have been ODOT/DLCD efforts

Eric recommended staying away from cities under 2,500 people. Bigger cities provide more bang for the buck. He believes that Grants Pass, Beaverton, Hillsboro have good Transportation System Plans and might be good communities for the workshops.

Various committee members suggested communities that were added to the list.

c. Action Items

- Update community workshop list with suggestions
- Internal workgroup begin to prioritize list of communities for workshops

IV. Next Steps

Potential meeting dates were discussed during the meeting. These dates have changed based on other committee member input. All meeting will be held in Salem. The new proposed dates are:

Meeting #2 – Tuesday, March 11th, 1:30 pm – 3:30 pm

Meeting #3 – Tuesday, May 13th, 1:30 am –3:30 pm

Meeting #4 – Wednesday, June 11th, 10:00 am – 12:00 pm

Summit #1 – April 15, 4:00 – 7:00 pm or April 17, 4:00 – 7:00 pm

Summit #2 – May 28, 4:00 – 7:00 pm or May 29, 4:00 – 7:00 pm

Meeting 2: March 11, 2003

Meeting 2 was facilitated by Jennifer Dill of PSU. PSU also developed the meeting minutes that follow.

1. Introductions/Attendance

Bill Adams, TGM

Tom Schwetz, LCOG

Jon Holan, Forest Grove Community Development

Reeve Hennion, Jackson County Planning Commission

Julie Warncke, City of Salem

Michal Wert, Northwest Consulting (via conference call)

Sumner Sharpe, Parametrix (via conference call)

Steve Johnson, PSU

Jennifer Dill, PSU

Bethany Johnson, University of Oregon

Bob Parker, University of Oregon

2. Update on location of workshops

Discussion of locations for Pilot Workshops. Coburg to be included because of several important growth management and transportation issues. Also, suggestion that Central Point be included in Medford workshop.

Suggestion that TGM might consider wider audience than just Planning commissioners, including the annual conference of League of Cities and league of Counties, and APA conference. Carol Lewis a good contact for League of Cities.

UO and PSU will let Advisory Committee members know when and where the workshops will take place, so they may attend if they can.

3. Preliminary Results from Interviews

PSU and University of Oregon presented overview of results from interviews conducted, and discussion followed from that, points included:

- Use photographs of local examples when possible
- Avoid use of terms like smart development and smart growth
- Consider the presentations as ways to engage in participatory dialogue, more than top down, telling locals what to do
- Go from specifics to general
- Need examples of small cities and towns
- Identify local conditions and problems and go from there

- Not time to utilize local developers in presentation but might consider incorporating video clip from developers talking about why they do smart growth.
- Important to consider market restraints to smart development
- Good example of how local presentations may be geared to local conditions, U. of Oregon's up coming presentation in Sweet Home, they want more details about narrow streets.

4. Draft Power Point Presentation from UO

University of Oregon students presented draft power point presentation.

- Do not use slides describing this project itself, provide that in informal introduction before slide show
- Current slide show starts with why care before explaining what it is, should be reversed
- Modify section on levels of policy and programs to more general description of the layers, not the specifics of "Ice-tea," "green-tea" etc.
- Make sure that the presentation does not sound anti-car
- Orient the presentation towards problems, such as congestion, not conceptual principles of smart growth
- Illustrate problems, such as with connectivity, how to get from one place to another in standard development
- Avoid obscure terminology and acronyms
- Could use information from Quick Response program of TGM from Wilsonville, Sherwood, Corvallis
- Need more about the financing and economic issues.
- Section talking about transportation problems doesn't show relation between street design and land use
- Presentation maybe too oriented toward planner audience, planning commissions may not have that level of understanding
- The interactive sections, where questions are asked of audience, could be problematic. There may not be responses. Be prepared for silence or with additional questions.
- The slide with the "4 C's" might be better with photos illustrating each of the principles.

5. Potential Topics for Materials

There was limited time to discuss the list of potential topics for briefs, fact sheets, and case studies. Bill Adams will review the list, which will be revised for the Committee to review again via e-mail.

6. Brainstorm Focus Group Questions

There was limited time to discuss focus groups questions. U. of Oregon expects to focus on narrow streets issue in Sweet Home, first pilot, and will probably have better idea of how to run the focus groups after that.

7. Future Meeting and Summit Dates

The next advisory committee meeting will be Thursday, May 15 in the afternoon.

The fourth advisory committee meeting will be Wednesday, June 11 10:00 am to noon.

The Summit will be held Friday April 25, time to be announced, in Salem. Advisory Committee members are invited.

Meeting 3: May 15, 2003

The third advisory committee meeting was facilitated by Bethany Johnson of the UO. The meeting was convened by conference call. The UO prepared the meeting minutes.

Purpose

The third advisory committee meeting was held on Thursday, May 15th from 1:30 – 3:00 via conference call. The purpose of the meeting was to provide the advisory committee with an update on project activities and key findings to date, to discuss the agenda for Summit #2, and to present the draft outline for the final report.

Participants

Bill Adams, TGM
Summer Sharpe, Parametrix
Michal Wert, MW Consulting
Steve Johnson, PSU
Jennifer Dill, PSU
Bob Parker, UO
Bethany Johnson, UO
Paul Seilo, UO
Tina Nunez, UO
Michelle Pezley, UO

Next Steps

The final advisory committee meeting will be held June 18th from 1:30 – 3:30 pm via conference call. Jennifer Dill will coordinate the call. During this meeting we will discuss the draft final report including key findings and recommendations. The draft report will be distributed to committee members via email before the conference call.

Key Findings Discussion

As of May 15th UO team had completed seven workshops and the PSU team had completed one workshop. The following is a summary of the major points discussed regarding key findings to date.

- Connectivity has emerged as an issue in most communities. They wrestle with connecting their local streets and arterials and connecting pedestrian and bicycle paths to the greater system.

- Some of the communities are identifying that they need more assistance with code development. Communities want to know how to actually implement some of the smart growth strategies. It will be important for us to remind the communities that TGM has a code assistance program.
- Many communities recognize that they need to do outreach to developers. The developers need to have access to case studies of successful smart development projects in other places than Portland. TGM does not specifically target developers with outreach materials. The TGM Quick Response program works with local governments and developers in cities and neighborhoods.
- It is important to highlight smart development projects that are already happening in the communities that we go into. The media tends to focus on major projects such as Orenco station; however, there are smart development projects that can be applicable to smaller jurisdictions such as the mixed-use development project in central point – Four Oaks Centre. Some small communities may be getting discouraged about smart development because they cannot attract big, sexy development. In our workshops we need to dispel the myth the “all or nothing” mentality.
- As communities grow and the demographics of the area changes, communities are grappling with their identity and their futures. How do you build a community that provides for and supports various interests and needs, specifically Hispanic and white populations, low income and wealthy residents, and environmental protection with new development. Smart development strategies may help communities resolve some of these issues.
- Periodic review is an opportunity for jurisdictions to update their comprehensive plan, which guides the long-range vision for the community. With SPI-83 many communities are not required to do periodic review. This is somewhat problematic because many plans are out of date.
- The tone of the workshop directly influences the success of the session. Our purpose is to present ideas and illicit dialogue, not preach the smart growth gospel. We are a neutral observer and messenger of new ideas about how to strengthen communities.

Summit #2

The purpose of Summit #2 is to present findings from the community workshops and receive input on recommendations specifically about technical assistance and outreach. Participants will be recruited through various means - an email invitation on the OPN listserve, letters to all planning commissioners in the state, and personal invitations to all those who have participated in the project to date. Advisory committee members are encouraged to come and to invite people.

Report Outline

The report will present the purpose and methodology of the project, summarize the key findings about barriers to integrating transportation and land use and provide recommendations about ways to improve technical assistance and outreach. Specific ideas from the advisory committee about the report included:

- Post an executive summary on the OPN website;
- PSU and UO will write two separate reports with a joint executive summary;
- Include “lessons learned” about how to run a workshop with planning commissioners;
- Concentrate on how to further outreach and education efforts to planning and local officials;
- Organize the findings in a matrix with regional or size of community categories;
- Include a discussion of why some of the planning tools are not effective. How could the tools be more effective?
- Reflect on the UO/PSU partnership; How are the programs structured differently?

Other Comments

After the report is complete, it would be beneficial for the students to present to the DLCD and ODOT committees, or maybe the joint committee.

Findings from this project would be a good OPI workshop. Bethany and Bob submitted a proposal to OPI. If we are chosen to give the presentation, we will collaborate with Bill and Jennifer to create a workshop.

Appendix C

Summary of Planning Commission Workshops

Background

To meet the project goals, CPW conducted 13 workshops with planning commissions throughout the state. Following are summaries from the 13 workshops.

Sweet Home Planning Commission Workshop

The first pilot workshop was held on Monday, March 17, 2003 with the Sweet Home Planning Commission from 6:00 to 7:30 p.m. in the Sweet Home City Council chambers. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and narrow streets in Sweet Home.

Participants included:

Frank Javersak, Sweet Home Planning Commission

Henry Wolthuis, Sweet Home Planning Commission

Richard Rowley, Sweet Home Planning Commission

Alan Culver, Sweet Home Planning Commission

Michael Kinney, Sweet Home Planning Commission

Jessica Coward, Sweet Home Planning Commission

Carol Lewis, City of Sweet Home Planning & Development Director

Charlene Adams, Planning Assistant

This summary includes: (1) a summary of the discussion about the presentation, specifically skinny streets; (2) a summary of the discussion about transportation and land use connections; (3) results of the workshop evaluation; and (4) key lessons learned.

Meeting structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and basic information about narrow or “skinny” streets. Following the presentation, participants engaged in an interactive discussion about narrow streets, current transportation and land use issues in Sweet Home, and barriers to implementing their land use and transportation goals. At

the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

Because the term “smart growth” has many different interpretations, CPW structured the presentation to test how the planning commission would respond to the use of this term. We included a few slides about the definition of smart growth and its defining principles. When asked, none of the commissioners had heard of the term “smart growth” and did not seem to react negatively to the use of this word. One commissioner considered it to mean, “planned growth, the best use of zones, and managing traffic.”

After the presentation, CPW facilitated a discussion about narrow or “skinny” streets. The group discussed the pros and cons of the beauty strip—the buffer between the sidewalk and the street. Some commissioners felt that the strip adds a beneficial buffer that provides increased pedestrian safety and enjoyment. This strip and the narrow streets, for some, reminded them of the “way streets used to be.” Other commissioners, however, felt that the maintenance issues associated with strips make them undesirable. In some areas of Sweet Home the strips collect trash and the City does not have the money to adequately maintain them. The City has had limited success with private property owners and renters maintaining strips in front of their homes. In addition, commissioners were concerned about the degree of comfort drivers feel while passing parked cars on narrow streets. Parking in alleys behind homes could be one solution to parking issues; however, some commissioners were concerned about safety in the alleys.

The commissioners wanted to know about the cost implications of narrow streets. Are they more expensive to maintain because more cars are concentrated on less pavement? Or are they less expensive because they are smaller streets and require less pavement and land acquisition? This would be a good topic for written material.

CPW engaged the commissioners and staff in a focus group discussion regarding Sweet Home’s transportation and land use issues, barriers to implementing their goals, and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the commissioners identified the following issues.

Sweet Home’s transportation and land use issues:

- Lack of public transit; no connection to neighboring commercial areas;
- Limited jobs in area;
- State mandates are incompatible with local needs;
- Poor road connectivity;

- Little political will or public support for “smart growth” improvements; and
- Limited money to pay for transportation improvements.

Obstacles to implementing transportation-efficient land use principles:

- Current land use patterns discourage road connectivity;
- City Council does not want to approve projects that will cost citizens money;
- There is limited money for pilot projects to test new strategies;
- Adjacent property owners are sometimes reluctant to work with neighbors;
- The City does not have a vision for its development;
- TPR standards are not appropriate for Sweet Home;
- The TSP developed for Sweet Home is unrealistic. It is difficult to determine which parts should be adopted;
- State-sponsored transportation improvements do not consider local values;
- The City feels forced to choose between bad development or no development;
- It is difficult to determine the nexus between small developments and improvement projects. Larger developments would help create a nexus with improvements;
- City ordinances are not well-written;
- The City does not require transportation SDCs; and
- Current SDCs are not adequate to fund needed improvements.

Tools that are available to address these issues:

- Development rules and regulations;
- Long range planning;
- Local Improvement Districts (LID);
- Urban renewal districts; and
- System Development Charge (SDC)

Kinds of assistance needed to help implement land use and transportation goals:

- Funds for testing implementation strategies;
- Technical assistance in layperson’s terms;

- Information on how to get funding for projects;
- Information that addresses costs of implementation;
- Reduced paperwork for grant applications;
- Strategies for engaging the public and the City Council;
- Information on the financial implications of a high percent of the population on a fixed income;
- Workshops allowing for presentations, discussions, and interactive activities;
- Training assistance grants to provide information to planning commissioners;
- Planning events for all commissioners in the region;
- Videos, audio cassettes, and electronic media;
- Telephone training modules with people from all over the county – meeting between experts - to hear about ideas from other parts of the country;
- Communication between commissioners – prioritizing the most important elements of planning in the community;

Ideal formats for assistance:

- *Workshops/discussions.* The commissioners agreed that workshops and discussions are the most helpful and stimulating means of technical assistance. They feel overwhelmed by the amount of reading material they are encouraged to read and appreciate opportunity for discussion. Specific ideas included:
 - Involve public and/or other city officials in a class; conference; workshop, to facilitate interactive learning
 - Offer training workshops at Oregon Planning Institute (OPI) conference;
- *Short, relevant reading material:* Because of the large amount of required/recommended reading, commissioners would like short, topic specific written materials.

Written Evaluation

After the workshop, Sweet Home commissioners and staff completed an evaluation form . The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. Two staff members and six commissioners completed the evaluation. Findings included:

- Four of the six planning commissioners responded to the question of how long they had been in the position. The average length of time for the four respondents was 3.6 years.

- Four of the six commissioners indicated that they had heard of the TGM Program before the workshop.
- The majority of commissioners would like paper-based educational materials. Three of the respondents indicated that the educational materials should be paper based, one said in the form of a website, and three responded that both paper materials and a website should be used. (Workshops was not provided as a choice in the survey.)
- Prior to our presentation, the planning commissioners had a moderate amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.5 regarding level of knowledge.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (See Table C-1).
- Commissioners were slightly more satisfied with the discussion element of the workshop than the PowerPoint presentation (See Table C-1).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-1. All eight of the respondents provided an answer to each of the questions provided in Table C-1.

Table C-1. Evaluation Criteria & Mean Response of Sweet Home Planning Commission Workshop.

EVALUATION CRITERIA	Response (Mean)
Presentation	
The topics covered are timely	4.00
The information presented was useful	3.75
I learned something new	3.50
The presenters were effective	4.00
The computer presentation was effective	3.75
I will use some of the ideas presented today in my work as a planning commissioner	3.14
Discussion/Focus Group	
The discussion covered issues that are important in our community	3.75
There was enough time to discuss the issues	4.13
The facilitator did a good job focusing the discussion	4.13
The discussion generated some useful ideas	4.25

Lessons Learned

CPW learned the following lessons during the Sweet Home workshop:

1. Using the term ‘smart growth’ and its related principles did not aggravate or create confusion for any of the commissioners.
2. CPW should balance providing theoretical transportation and land use information with community-specific information related to an actual issue the community is facing.
3. The commissioners indicated that they found the focus group discussion and interactive activity more beneficial than the PowerPoint presentation.
4. The CPW group needs to understand that the commissioners have varying levels of knowledge pertaining to issues ranging from basic planning concepts, to more complex issues such as the connection between land use and transportation. Therefore, it is important for the CPW group to consider the following actions when preparing for the next communities:

5. It is important to make initial contact with either the planning staff or commissioners to ascertain the commissions level of understanding regarding transportation and land use concepts;
6. It is important to modify each of the workshops so that they are beneficial for commissioners with varying levels of knowledge.
7. CPW needs to make it clear to commissioners that the purpose of the workshops is to provide information about transportation and land use connections, not to solve any of the community's problems.
8. CPW needs to be prepared to involve and utilize the expertise of any planning staff member who may be present.

Stayton Planning Commission Workshop

The second pilot workshop was held on Monday, April 14, 2003 with the Stayton Planning Commission from 7:00 to 8:30 p.m. in the Stayton City Council chambers. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and transportation system plans.

Participants included:

Gerry Aboud, Mayor, City of Stayton

Steve Goeckritz, Interim Planning Director, City of Stayton

Ralph Lewis, Commission Chair, Stayton Planning Commission

Karen Odenthal, Stayton Planning Commission

Judy Snider, Stayton Planning Commission

Carol Tower, Stayton Planning Commission

Don Walters, Stayton Planning Commission

Joe Wolf, Student Stayton Planning Commission

Carol Tower, Stayton Planning Commission

Dave Valencia, Stayton Planning Commission

Don Koenig, City Council Liaison

Ryan Marquardt, RARE Planning Intern

Teresa Williams, Reporter, Stayton Mail

This summary includes: (1) a summary of the discussion following CPW's presentation about smart growth and transportation system plans; (2) a summary of the discussion about transportation and land use connections; (3) results of the workshop evaluation; and (4) key lessons learned.

Meeting structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about transportation system plans. Following the presentation, participants engaged in an interactive discussion about transportation system plans, current transportation and land use issues in Stayton, and barriers to implementing their land use and transportation goals. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

Because the term "smart growth" has many different interpretations, CPW structured the presentation to test how the planning commission would

respond to the use of this term. When asked about smart growth, most participants seemed to have an understanding of the term. One of the commissioners defined smart growth as “high density development laid out near arterials.” Another participant asked if the goal of smart growth was to reduce reliance on automobiles. CPW explained that one of the principles of smart growth is to provide a choice of transportation options.

One commissioner wanted to know CPW’s assessment of Stayton’s biggest transportation issues. CPW explained that our role in this project is not to make judgments about community priorities or to solve local problems; rather, community values influence the prioritization of transportation issues. The Stayton planning director stated that one of the community’s largest transportation problems is partially paved streets that do not comply with City’s street standards. He was interested to know what other communities have done to improve their streets. CPW mentioned a few funding sources for streets improvements including local improvement districts, bond measures, and system development charges. Adopting narrow street standards was discussed as a potential policy alternative.

A commissioner noted that the growing population gives the City a unique opportunity to increase its livability. Planning and vision can improve the trail and bike system to increase connectivity and enhance appreciation of the beautiful nearby scenery.

Following the presentation, CPW engaged the commissioners and staff in a specific discussion regarding Stayton’s transportation and land use issues, barriers to implementing their goals, and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the commissioners identified the following issues.

Stayton’s transportation and land use issues:

- Difficulty maintaining streets for current and future use;
- Lack of a connected transportation system, especially within residential neighborhoods near downtown;
- Too many unimproved streets (partial pavement with gravel sides);
- Poor sidewalks and road crossing around grocery stores;
- Lack of a lighted crosswalk;
- Limited pedestrian walkways;
- Maintenance of collector and arterial standards; and
- Lack of transportation options for youth under age 16.

Stayton’s transportation/land use goals:

- Provide a safe and efficient system that provides options for everyone;

- Create a bike trail that connects city to parks and schools; and
- Make sidewalk system ADA accessible.

Obstacles to implementing transportation-efficient land use principles:

- Lack of available funding mechanisms;
- Difficulty determining who pays for street improvements ;
- Difficulty determining how to pay for the capital improvement plan, and how to prioritize projects as community needs change;
- Piecemeal sidewalk development; and
- Implementing the TSP.

Tools that are available to address transportation and land use issues:

- Parks plan, trail plan in conjunction with transportation plan;
- Ordinances that require developers to include sidewalks in subdivisions;
- Capital improvement plan; and
- Transportation system plan.

Kinds of assistance needed to help implement land use and transportation goals:

- Assistance securing funding projects;
- Information about ways to fund projects ; and
- Strategies for building sidewalk sections on piecemeal new development.

Ideal formats for assistance:

- *Workshops/discussions.* Commissioners enjoyed the interactive workshop and expressed interest in participating in similar events;
- *Short, relevant reading material.* Because of the large amount of required/recommended reading, commissioners would like short, topic specific written materials, such as executive summaries;
- *Illustrations.* The commissioners prefer illustrations to written materials; and
- *Web Directory.* A list of specific organizations that offer grants.

Written Evaluation

After the workshop, Stayton commissioners and staff completed an evaluation form. The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. One staff member and seven planning commissioners, one student commissioner and one city councilor completed the evaluation. Key findings included:

- Most of the planning commissioners responded to the question of how long they had been in the position. The average length of time was 3.7 years, with the range of 1-10 years.
- Seven of the nine participants indicated that they had heard of the TGM Program before the workshop.
- When asked what form they would like to see the written materials in, there was a relatively equal distribution between participants wanting paper based (2 responses), web based (2 responses), and paper and web based (3 responses) educational material.
- Prior to our presentation, the planning commissioners had a moderate to above average amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.9 regarding level of knowledge, with the responses ranging from 3-5.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (See Table C-2).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (See Table C-2).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-2. All nine of the respondents provided an answer to each of the questions provided in Table C-2.

Table C-2. Evaluation Criteria & Mean Response of Stayton Planning Commission Workshop.

EVALUATION CRITERIA	Response (Mean)
Presentation	
The topics covered are timely	4.3
The information presented was useful	4.0
I learned something new	3.9
The presenters were effective	4.1
The computer presentation was effective	4.9
I will use some of the ideas presented today in my work as a planning commissioner	3.8
Discussion/Focus Group	
The discussion covered issues that are important in our community	4.4
There was enough time to discuss the issues	3.9
The facilitator did a good job focusing the discussion	4.0
The discussion generated some useful ideas	3.7

Lessons Learned

CPW learned the following lessons during the Stayton workshop:

1. Using the term ‘smart growth’ and its related principles did not aggravate or create confusion for any of the commissioners.
2. The commissioners indicated that they found the transportation system plan module of the PowerPoint presentation to be the more helpful than the ‘smart growth’ material. Therefore, CPW will continue to include a module that speaks directly to the communities needs, in addition to the ‘smart growth’ information.
3. CPW must be prepared with better probing questions to initiate conversation.
4. CPW will continue to utilize the expertise of local planning staff in attendance to help focus the workshops on information relevant to the local community.
5. The commissioners liked the workshop, but suggested that CPW provide an outline or handouts for them to follow during the presentation.

Klamath Falls Planning Commission Workshop

CPW conducted the third planning commission pilot workshop on Monday, April 14, 2003 at the Klamath Falls City Hall from 7:00 p.m. to 8:30 p.m. The specific purpose of this workshop was to discuss issues involved with transportation-efficient land use and the integration of smart growth principles into comprehensive planning in the community of Klamath Falls.

Participants included:

Sandra Zaida, Klamath Falls Planning Director

Trish Seiler, City Councilor

Bill Adams, City Councilor

Vince Wachter, Planning Commissioner

David Doven, Planning Commissioner

Dave Goss, Planning Commissioner

Andy Frei, Planning Commissioner

Ernest Palmer, County Planning Commission

Howard Thurston, Planning Commissioner

Mark Ahalt, Planning Commissioner

Jeff Ball, Planning Commissioner

Bob Marsalli, Planning Commissioner

This summary includes: (1) a summary of the discussion about the presentation that, for Klamath Falls, addressed the topics of comprehensive planning, density and skinny streets; (2) a summary of the discussion about transportation and land use connections; (3) the results of the written evaluation of the workshop; and (4) the key lessons learned.

Meeting structure

CPW began the workshop with a presentation focusing on the purpose of the comprehensive plan, the connection between transportation and land use, the principles of smart growth, and basic information about development density and narrow, or “skinny,” streets. Following the presentation, participants engaged in an interactive discussion about comprehensive planning, narrow streets, current transportation and land use issues in Klamath Falls, and barriers to implementing their land use and transportation goals. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

Because the term “smart growth” has many different interpretations, CPW structured the presentation to consider how the planning commissioners and city councilors would respond to the use of this term. We included a few slides about the definition of smart growth and its defining principles, and we asked whether the participants had heard of the term. About half replied that they had, and no one reacted negatively. When asked, however, no one wanted to volunteer a definition of smart growth.

CPW explained the relationship between narrow streets and public safety. One of the commissioners asked if there are studies in Oregon that show how narrow streets are safer than wide streets. The same commissioner responded to the narrow street graphic with landscaped buffers next to the sidewalk. His main concern was being able to see children moving into the street from behind trees or other types of vegetation in the planting strip. CPW mentioned how narrow streets tend to slow a driver’s speed and that reduced speed allows drivers to be more aware of their surroundings and to have time to react to other street users.

A commissioner inquired about ways to accommodate extra vehicles, such as boat trailers and RV’s, that some residents own and whether there are places to park them on narrow streets. CPW described how some communities incorporate alleys into newer subdivisions, thus reducing the need for on-street parking. Several participants cited safety issues in existing alleys as a reason for their resistance to alleys in newer subdivisions. Other narrow street concerns included whether snowplows could navigate them and whether the terrain must be taken into consideration.

The participants expressed concern that the local government feels it has little control over its planning process and that, if DLCD (the Department of Land Conservation and Development) does not like the local plans, they will not get approved. Other comments included a statement that the state transportation plan does not fit local needs, and a comment that land availability is not an issue since the city’s UGB can accommodate 50 years of growth. Regarding density, one commissioner indicated that people move to Klamath Falls during their years of retirement in order to get away from high-density living. The commissioner inquired about good reasons to promote density in Klamath Falls.

Following the presentation, CPW engaged the commissioners and staff in a discussion regarding Klamath Falls’ transportation and land use issues, barriers to implementing their goals, and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the commissioners identified the following issues.

Klamath Falls transportation and land use issues:

- No significant issues for transit because growth is relatively slow and small;

- Lack of local control of transportation and land use decisions – “ODOT (Oregon Department of Transportation) will tell us what to do and we don’t agree with their orders;”
- Lack of teamwork with ODOT and other state agencies;
- The need for flexibility and on the ground participation by ODOT in Klamath Falls rather than universal solutions from the state;
- Overcoming anticipated difficulty partnering with ODOT to increase access by building a needed interchange with the expansion of the community college;
- Need for clarity on state (ODOT/DLCD) and regional governance expectations with regards to state land use needs, regulations and decisions;
- Fringe development within the county resulting from incompatible land use planning between the city and county and less stringent county standards;
- Connecting existing neighborhoods with the downtown;
- Outdated city and county code system that is confusing for citizens; and
- Only part of the regional population is under city jurisdiction, with 20 out of 40 thousand people living within city limits.

Klamath Falls transportation/land use goals:

- With such an abundance of land, Goal 12 should get more attention because most people in Klamath Falls do not know about it;
- Consideration of multiple transportation modes in developments;
- Compatible street standard created through collaboration between city and county within the UGB--for example, “so that bike paths don’t just end;”
- The need for urban and rural planning to share responsibilities and to equally apply the same standards to city and county land within the UGB. There is also a need for a set of rural standards outside the UGB;
- Flexible development standards to accommodate market demand; the real estate market is calling for 3-bedroom homes on half-acre lots; and
- Connectivity between neighborhoods in a smart way will be a challenge; we do have some great “smart growth” type neighborhoods, but we need connectivity.

Obstacles to implementing transportation-efficient land use principles:

- Developers are resistant to including sidewalks and alleys in new subdivisions;
- Decision makers, developers and the public are not educated on smart growth principles;
- There is no incentive to infill old areas while there is a property tax reduction. “We have lots of vacant lots and torn down lots, but there’s little incentive to rebuild here; no incentive to developers;”
- Lack of funding to satisfy the new demand brought on by the new development; i.e., no money to change streets;
- Lack of coordination between the city and county that prevents planning for the greater good of the people;
- Lack of city or state funding and flexibility from the state;
- Limited accurate and consolidated information on policies that can be uniformly applied throughout the state (i.e. those that apply equally to Willamette valley and Klamath Falls);
- The state’s reliance on its reputation for Oregon’s land use planning system and on public interest groups;
- Lack of resources and factual information for local decision makers versus expensive consultants to devise plans to meet the local code;
- Issues of mistrust of government officials and ways to educate the public about the values of planning as well the planning process;
- Regulators out of touch with the local government;
- ODOT is reactive not proactive to local development plans; and
- The city has done a great job on the local level, it just needs assistance to meet the above challenges.

Tools that are available to address transportation and land use issues:

- Political pressure from the state disengages the local process if local government is constantly required to meet with state representatives to settle issues; a more proactive approach is needed;
- Funded mandates would assist with implementation of state and federal policies; and
- Dissemination of information from local DLCD representative has been very helpful especially in securing TGM grants.

Kinds of assistance needed to help implement land use and transportation goals:

- A series of publications aimed at planning topics (similar to TGM's smart growth literature) that gives an introduction to planning concepts—graphics are also very helpful;
- Topics for publications may include architecture and design for human scale; transportation; zoning concepts; Planning 101 (DLCD, the comprehensive plan, other plans, who are decision-makers); and
- Show best practices and accurate information describing what really works on the ground.

Ideal formats for assistance:

- *Workshops/discussions.* Commissioners suggested either tours or a smart growth workshop series that show how smart growth works;
- *Short, relevant reading material.* Because of the large amount of required and recommended reading, commissioners would like short, topic-specific written materials, such as executive summaries. The commissioners had the following suggestions:
 - 1) A code development handbook in fact sheet or checklist format
 - 2) Publications on what park plans require and what is a facility plan
 - 3) Publication material for the general public that addresses the value of planning, the planning commission and how the comprehensive plan relates to the code;
- *Illustrations.* The commissioners prefer a combination of illustrations and written materials and suggested using a simulation of how specific neighborhoods may look after smart growth modifications; and
- *Web Directory.* A majority of the respondents prefer reading materials in the form of paper and web sites.

Written Evaluation

After the workshop, Klamath Falls commissioners, council members and staff completed an evaluation form . The purpose of the form is to provide CPW with information on how to improve the workshop for other communities. Two city council members and eight planning commissioners completed the evaluation. Key findings include:

- Most of the planning commissioners responded to the question of how long they had been in the position. The average length of time for the eight respondents was 7.4 years.

- Five of the eight planning commissioners and one of the two city councilors indicated that they had heard of the TGM Program before the workshop.
- When asked what form they would like to see the written materials in, there was a relatively unequal distribution between participants wanting paper based (1 response), web based (2 responses), and paper and web based (5 responses) educational material.
- Prior to our presentation, the planning commissioners had a moderate amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.0 regarding level of knowledge.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (See Table C-3).
- Commissioners were slightly more satisfied with the discussion element of the workshop than the PowerPoint presentation (See Table C-3).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-3. All ten of the respondents provided an answer to each of the questions provided in Table C-3.

Table C-3. Evaluation Criteria & Mean Response of Klamath Falls Planning Commission Workshop.

EVALUATION CRITERIA	Response (Mean)
Presentation	
The topics covered are timely	3.7
The information presented was useful	3.4
I learned something new	3.4
The presenters were effective	3.3
The computer presentation was effective	3.3
I will use some of the ideas presented today in my work as a planning commissioner	3.4
Discussion/Focus Group	
The discussion covered issues that are important in our community	3.5
There was enough time to discuss the issues	3.9
The facilitator did a good job focusing the discussion	3.5
The discussion generated some useful ideas	3.9

Lessons Learned

CPW learned the following lessons during the Klamath Falls workshop:

1. Using the term ‘smart growth’ and its related principles did not aggravate or create confusion for any of the participants.
2. There was a need to further localize the presentation, specifically to address such issues as how skinny streets function in the snow.
3. There was a need to provide a clear context for why we are there and to show how what we were saying related to what they were dealing with.
4. Participants appreciated receiving a folder of information about smart growth/transportation planning.
5. It is important to tell participants how the state will use the information – what TGM is going to do with the information gathered.
6. There is a fundamental disconnect between how state agencies and local jurisdictions approach the planning process.
7. There was an interest in addressing connectivity and revitalization of older, traditional neighborhoods.

8. CPW should request the workshop to be held around a table to facilitate the discussion element.

Grants Pass Planning Commission Workshop

CPW conducted the fourth pilot workshop with the Grants Pass Planning Commission on Wednesday, April 23, 2003, from 5:30 to 7:00 p.m. in the Grants Pass City Council chambers. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and transit-oriented development.

Participants included:

Lois Cowell, Chairman, Grants Pass Planning Commission
Ferris Simpson, Vice Chairman, Grants Pass Planning Commission
Loree Arthur, Grants Pass Planning Commission
Robert Bean, Grants Pass Planning Commission
Michael Newman, Grants Pass Planning Commission
Ed Farrar, Grants Pass Planning Commission
Jim Huber, Planning Director, City of Grants Pass
Robert Ivy, Assistant Planner, City of Grants Pass
Carla Angeli, Assistant Planner, City of Grants Pass
Stacey Kellenbeck, Assistant Planner, City of Grants Pass

This summary includes: (1) a summary of the discussion following CPW's presentation about smart growth and transit-oriented development; (2) a summary of the discussion about transportation and land use connections; (3) the results of the workshop written evaluation; and (4) the key lessons learned.

Meeting structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about transit-oriented development. Following the presentation, participants engaged in an interactive discussion about transit-oriented development, current transportation and land use issues in Grants Pass, and barriers to implementing their land use and transportation goals. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

Because the term "smart growth" has many different interpretations, CPW structured the presentation to consider how the planning commissioners would respond to the use of this term. When asked about smart growth, most participants seemed to have an understanding of the term. One of the

commissioners defined smart growth as “not developing further than the existing infrastructure.” A second commissioner stated, “The existing codes will encourage the right kind of building which inevitably makes growth smart.”

CPW then presented the commissioners with a definition of smart growth. One of the commissioners asked, “Why is the availability of water not included into your definition?” CPW explained that smart growth encompasses many different principles and that the availability of water could certainly be part of fully utilizing existing infrastructure.

CPW presented the commissioners with a slide summarizing five principles of smart growth. One of the commissioners wanted an additional description of the human-scale development principle. CPW explained that development at the human-scale is an architectural style oriented toward pedestrian and bicycle use.

Following the presentation, one commissioner stated that it ignores the fact that development in Grants Pass is market driven. The commissioner went on to explain that, in addition to the development code, it is the local market that influences the type of development that is constructed. CPW provided a two-part response to the commissioner’s comment. The first part was an explanation that CPW’s role is not to try and solve local problems; rather, it is to provide information for communities to think about when planning for the future. The second part of the response expanded on the importance of long-range planning. CPW explained that the material in the presentation is intended to provide commissioners with information to use as part of their long range vision for the community.

One commissioner stated that the development in Grants Pass has not grown from the center out; there are pockets of development around town. The commissioner wanted to know how the city should plan to properly connect the separate pockets. CPW described how the city could connect the development through their comprehensive plan and zoning code. CPW also indicated that the city could control for the location of growth by directing the location of future infrastructure.

A second commissioner wanted to talk about the current zoning map and whether it would produce the kind of city that the commissioners will want in the future. The commission discussed this issue and decided that it was something they needed to address at a later date.

A third commissioner stated that the commission needed to remain cognizant of the fact that the city is part of a larger regional planning area which includes Medford. The commissioner also stated that Medford is forecasted to experience a high growth rate that will place additional development pressure on Grants Pass. The commissioner stated, “We could become a bedroom community of Medford.” CPW replied that the projection of a high rate of growth is even more reason to remember the smart growth principles when contemplating long-range planning efforts.

CPW engaged the commissioners and staff in a specific discussion regarding Grants Pass's transportation and land use issues, barriers to implementing their goals, and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the participants identified the following issues.

Grants Pass's transportation and land use issues:

- Lack of connectivity between local streets and pockets of development;
- High price of housing;
- Dependence on the automobile;
- Unimproved and old roads not up to city standards;
- Lack of available funding mechanisms;
- Lack of a master plan and a vision for the community;
- Development is strictly market-driven;
- Lack of adequate time in planning commission meetings;
- UGB expansion and density requirements; and
- Strategies to promote smart growth – local improvement districts, redevelopment districts, etc.

Grants Pass's transportation/land use goals:

CPW did not have time to ask this question.

Obstacles to implementing transportation-efficient land use principles:

- Lack of available funding mechanisms;
- Absence of any long-term vision for the city and how it should grow;
- Local market does not provide any incentives for developers to implement smart growth principles; and
- Local lenders have not wanted to finance development that includes smart growth principles.

Tools that are available to address transportation and land use issues:

- Local zoning code;
- Regional planning efforts;
- Long-range planning efforts; and
- Transportation System Plan.

Kinds of assistance needed to help implement land use and transportation goals:

- Information about funding mechanisms;
- Information and technical assistance from local DLCD representatives;
- Assistance in making the planning commission more proactive and less reactive;
- ODOT, DLCD, and TGM workshops; and
- State mandates requiring compliance with aspects of smart growth.

Ideal formats for assistance:

- *Workshops/discussions.* Commissioners enjoyed the interactive workshop and expressed interest in participating in similar events; and
- *Short, relevant reading material.* Because of the large amount of required and recommended reading, commissioners would like short, topic specific written materials, such as executive summaries.

Written Evaluation

After the workshop, Grants Pass commissioners and staff completed an evaluation form . The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. Six planning commissioners completed the evaluation. Key findings included:

- Most of the planning commissioners responded to the question of how long they had been in the position. The average length of time was 3.8 years, with the range of 1-15 years.
- Two of the six participants indicated that they had heard of the TGM Program before the workshop.
- When asked what form they would like to see the written information in, one participant wanted paper based material, three wanted web based material, and one wanted paper and web based material.
- Prior to our presentation, the planning commissioners had a moderate to above average amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.2 regarding level of knowledge, with the responses ranging from 2-5.

- Commissioners agreed that the information presented in the PowerPoint presentation was useful and that the presenter was effective (See Table C-4).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (See Table C-4).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-4. All six of the respondents provided an answer to each of the questions provided in Table C-4.

Table C-4. Evaluation Criteria & Mean Response of Grants Pass Planning Commission Workshop.

Evaluation Criteria	Response (Mean)
Presentation	
The topics covered are timely	3.8
The information presented was useful	4.2
I learned something new	4.0
The presenters were effective	4.2
The computer presentation was effective	3.8
I will use some of the ideas presented today in my work as a planning commissioner	4.3
Discussion/Focus Group	
The discussion covered issues that are important in our community	4.2
There was enough time to discuss the issues	3.2
The facilitator did a good job focusing the discussion	3.7
The discussion generated some useful ideas	4.2

Lessons Learned

CPW learned the following lessons during the Grants Pass workshop:

1. Using the term 'smart growth' and its related principles did not aggravate or create confusion for any of the commissioners.

2. CPW should attempt to meet with a planning staff member before the workshop to find out the level of knowledge among the planning commissioners and to discuss their individual feelings about certain smart growth issues.
3. CPW must be prepared to respond to the question of why they are discussing a specific on-the-ground example of smart growth when the community's market is dictating something completely different. CPW needs to make it clear in the introduction that we are discussing long-range planning and issues to consider when planning for the future.
4. Human scale development continues to be the smart growth principle that planning commissioners struggle with the most. They do not seem to understand how it ties in with the other elements. CPW needs to be prepared with a better explanation and existing examples of human-scale development in each community.
5. The presentation and discussion are more effective when CPW is able to find examples of smart growth within each community.
6. In order to allocate an adequate amount of time to discuss each question, the facilitator needs to describe in the introduction to the discussion that it is important to get through all of the questions. The facilitator needs to explain that he or she may be interrupting the discussion at various points to move the group forward on a new question.

Estacada Planning Commission Workshop

The fifth workshop was held on Thursday, April 24, 2003 with the Estacada Planning Commission from 7:00 to 8:30 p.m. in the Estacada City Hall Council Chambers. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and downtown revitalization.

Participants included:

Randy Ealy, City Manager, City of Estacada
Allen Cameron, Chair, Estacada Planning Commission
Tom Sager, Vice Chair, Estacada Planning Commission
Richard Hartwig, Estacada Planning Commission
Jeff Copeland, Estacada Planning Commission
Brenda Crosby, Estacada Planning Commission
Don McGregor, Estacada Planning Commission

This summary includes: (1) a summary of the discussion about the presentation for Estacada that addressed the topics of smart growth and downtown revitalization; (2) a summary of the discussion about transportation and land use connections; (3) the results of the workshop evaluation; and (4) the key lessons learned.

Meeting structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about downtown revitalization. Following the presentation, participants engaged in an interactive discussion about downtown revitalization, current transportation and land use issues in Estacada, and barriers to implementing their land use and transportation goals. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops and educational materials.

Meeting Summary

Because the term “smart growth” has many different interpretations, CPW structured the presentation to test how the planning commission would respond to the use of this term. When asked about smart growth, a few of the participants seemed to have an understanding of the term. One of the commissioners defined smart growth as “the development of homes and businesses close together with less transportation.” Another participant defined smart growth as “development that uses infill land,” and another participant replied that smart development refers to “access.” CPW

explained the principles of smart growth with respect to transportation-efficient land use.

The commissioners were interested in discussing how access management of the main highway influences Estacada's downtown economic development plans. In general, the commissioners were interested in ways to keep business downtown and expressed enthusiasm for creating a design review committee. CPW noted how the City has already incorporated street trees and completed some façade improvements in their downtown.

Some commissioners inquired about the technical requirements to expand their Urban Growth Boundary (UGB). This expansion would allow them to provide additional housing opportunities and to acquire commercial or industrial property. CPW explained that the technical requirements involve demonstrating there is a need for land, typically in the form of supply and demand. CPW also explained how population forecasts can assist in determining housing and growth projections. One commissioner responded to this by asking how they can find out where the 2040 Metro Plan is now. Estacada worked on the 2040 plan a few years back with the impression that it would provide some population forecast information for Estacada.

Following the presentation, CPW engaged the commissioners and staff in a specific discussion regarding Estacada's transportation and land use issues, barriers to implementing their goals, and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the commissioners identified the following issues.

Estacada's transportation and land use issues in the next five years:

- Getting in and out of Portland;
- Substandard streets;
- Parking may become a bigger issue;
- Connectivity issues, some are due to topography, some are due to schools and safety issues;
- Other modes are a challenge due to topography;
- Issues with Tri-Met employment tax;
- Coordination with ODOT;
- Pressure for growth as a City that is located along a highway, but both the City and the state don't want certain types of development along the highway;
- Lack of living wage jobs in downtown;
- The demand for goods and services; housing applications are increasing;

- Access to commercial development and industry along the highway (specific areas of concern include the River Mill area and ODOT's gravel pits located on land zoned commercial); and
- Lack of development from the complicated development process imposed on developers by the City and through persistent micro-managing by ODOT.

Tools that are available to address transportation and land use issues:

- Comprehensive plan and zoning changes in periodic review; unsure if zone changes may lead to retribution from the state in future grant applications;
- UGB expansions in conjunction with periodic review; and
- Population forecasts and growth projections for land and housing needs in the 2040 Metro plan (the City currently doesn't have a copy of this report).

Estacada's transportation/land use goals:

- Providing jobs for local residents;
- Connectivity to Mollala and Sandy; by shuttle bus or motorcycle;
- Downtown revitalization; wider downtown sidewalks;
- Widening the highway with ODOT's assistance; straighten out the Carver Curves; and
- Retaining enough commercial jobs near residential development to reduce the amount of travel outside of town for shopping, working and recreating.

Obstacles to implementing transportation-efficient land use principles:

- Bureaucracy and too many rules complicates and prolongs information exchange between the state and local jurisdiction;
- ODOT's inflexibility on local issues; i.e. access to the main highway;
- Lack of funding for beautification projects;
- Difficulty affording housing and land due to large lot zoning requirements (currently there are many 20-acre parcels and it's difficult to find one acre parcels);
- Lack of control over local issues; ironically, allowing the City to annex or grow will result in more local control;
- Lack of public support or understanding of new projects; i.e. beautification and traffic calming;

- Keeping businesses downtown; According to one commissioner, “the state’s idea is to leave Estacada in the woods.; a year and a half ago someone found 17 empty retail spaces in Estacada. You can take Canby as a prefect example. Their downtown core was a dead area. Now, they’ve filled it up and the rents have increased 20 cents per square foot;” and
- Lack of growth and economic development; as one commissioner stated, “Not much has occurred out here. This is why I built my business here-because I thought the growth would occur here.”

Kinds of assistance needed to help implement land use and transportation goals:

- More effective partnerships with ODOT;
- Increased regional coordination between the City and County;
- Proactive versus reactive leadership from state agencies;
- Positive reinforcement from the state, actively following up on state mandates rather than “putting out more publications, books or feel good things;”
- Funded mandates; and
- More information on the design review process.

Ideal formats for assistance:

- *Workshops/discussions.* City staff expressed interest in interactive workshops;
- *Short, relevant reading material.* In general, the commissioners do not prefer written material;
- *Illustrations.* One commissioner expressed interest in the connectivity graphic used in the presentation and indicated it really explained the lack of access through some home developments and “was glad you brought it to our attention;” and
- *Web Directory.* A few commissioners prefer using the web for information.

Written Evaluation

After the workshop, Estacada commissioners and staff completed an evaluation form . The purpose of the form is to provide CPW with information on how to improve the workshop for other communities. All six planning commissioners completed the evaluation. Key findings include:

- All of the planning commissioners responded to the question of how long they had been in the position. The average length of time for the six respondents was 4.2 years.
- Four of the six planning commissioners indicated that they had heard of the TGM Program before the workshop.
- When asked what form they would like to see the written materials, there was a relatively equal distribution between participants wanting paper based (2 responses), web based (2 responses), and paper and web based (2 responses) educational material.
- Prior to our presentation, the planning commissioners had a moderate amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.5 regarding level of knowledge.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (See Table C-5).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (See Table C-5).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-5. All six of the respondents provided an answer to each of the questions provided in Table C-5.

Table C-5. Evaluation Criteria & Mean Response of Estacada Planning Commission Workshop.

Evaluation Criteria	Response (Mean)
Presentation	
The topics covered are timely	4.2
The information presented was useful	3.5
I learned something new	4.0
The presenters were effective	4.0
The computer presentation was effective	3.5
I will use some of the ideas presented today in my work as a planning commissioner	3.8
Discussion/Focus Group	
The discussion covered issues that are important in our community	3.7
There was enough time to discuss the issues	3.5
The facilitator did a good job focusing the discussion	3.5
The discussion generated some useful ideas	3.7

Lessons Learned

CPW learned the following lessons during the Estacada workshop:

1. Using the term ‘smart growth’ and its related principles did not aggravate or create confusion for any of the participants.
2. We need to localize the presentation, specifically to address such issues as how skinny streets function in rural areas with large right of ways.
3. We need to provide a clear context for why we are there and to show how what we are saying relates to what they are dealing with.
4. CPW must be prepared with better probing questions to focus the discussion.
5. CPW will continue to utilize the expertise of the local planning staff in attendance to help focus the workshops on information relevant to the local community.
6. We need to incorporate rural examples of smart growth into the community specific Power Point module.

7. There is a fundamental disconnect between how state agencies and local jurisdictions approach the planning process.
8. There was an interest in addressing connectivity and in establishing a design committee group within Estacada.

Talent Planning Commission Workshop

CPW conducted the sixth workshop with the Talent Planning Commission on Thursday, April 24, 2003, from 7:00 to 8:30 p.m. in the Talent Community Center. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and transit-oriented development.

Participants included:

Kevin Cronin, Planning Director, City of Talent
Cindy Harper, Talent Planning Commission
Carol Malcolm, Talent Planning Commission
Linda Cade, Talent Planning Commission
William Cecil, Talent Planning Commission
Carolyn Van Loo, Talent Planning Commission
Cori Cooper, Student Talent Planning Commission
Kathy Hackstock, Secretary, Talent Planning Commission
Brian Roberts, Talent City Council
Ken Gosling, Talent Parks Commission

This summary includes: (1) a summary of the discussion following CPW's presentation about smart growth and transit-oriented development; (2) a summary of the discussion about transportation and land use connections; (3) the results of the workshop written evaluation; and (4) the key lessons learned.

Meeting structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about transit-oriented development. Following the presentation, participants engaged in an interactive discussion about transit-oriented development, current transportation and land use issues in Talent, and barriers to implementing their land use and transportation goals. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

Because the term "smart growth" has many different interpretations, CPW structured the presentation to consider how the planning commissioners would respond to the use of this term. When asked about smart growth, most participants seemed to have an understanding of the term. One of the commissioners defined smart growth as "development that allows people to

live close to transportation, grows up instead of out, provides different types of housing, and is oriented to historic preservation.” A second commissioner stated, “The things proposed in smart development remind me of my childhood, front porches; we are going back to the way it was before.”

Following the presentation, one commissioner wanted information on how effective transit-oriented development has been in rural areas. CPW explained that the majority of transit-oriented development has been implemented in urban areas because a regional transportation system is the key element. CPW then explained that the transit system operated by the Rogue Valley Transit District between Medford and Ashland along 99W and Talent Avenue provides the potential for transit-oriented development in Talent. In addition, CPW described the two potential locations for transit stops identified by the City of Talent’s Planning Director. The two locations are as follows: (1) the intersection of Talent Avenue and Rapp Road; and (2) the location of the new multi-modal transportation center.

A second commissioner wanted to talk about the fact that most public transit systems do not pay for themselves. He indicated that as a community you have to decide that providing public transit is worth the investment without making a profit. CPW described that it is important to provide people with transportation options and to consider those in the community who are transportation disadvantaged.

A third commissioner asked if CPW would be speaking to any group other than planning commissioners. Specifically, the commissioner wanted to know if CPW would be working with developers, the banking industry, or counties. CPW replied that although there are many players in smart growth development, the scope of this project is only to engage planning commissioners. CPW also indicated that at least one county (Jackson County) will be included in the workshops.

The final comment received on the PowerPoint presentation was from a fourth commissioner who stated that it is correct to place more emphasis on a regional perspective when planning for growth. The commissioner added that using a regional lens for planning makes the state requirement that jurisdictions provide a 20 year supply of buildable lands seem arbitrary and inappropriate.

Following the presentation, CPW engaged the commissioners and staff in a specific discussion regarding Talent’s transportation and land use issues, barriers to implementing their goals, and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the commissioners identified the following issues.

Talent’s transportation and land use issues:

For the Next 5 Years

- Maintain livability, specifically human scale development, for future use;

- Lack of pedestrian connectivity between Highway 99 and Talent Avenue;
- Lack of pedestrian and bicycle connectivity across Highway 99;
- Poor connectivity between the city's parks;
- Poor sidewalks along local streets;
- Lack of safety for all modes at certain locations along local streets;
- Pockets of county land within city limits; and
- Increase community involvement.

For the Next 20 Years

- Traffic congestion resulting from growth;
- Maintain livability, specifically human scale development, for future use;
- Allow for growth while still maintaining livability;
- Enhance infrastructure for bicycle and pedestrian use;
- Create a pedestrian connection between the new skateboard park, the new multi-modal transportation center, and downtown;
- Improve the connectivity between the city and the Bear Creek Greenway;
- Update the city's existing transportation plan;
- Rogue Valley's population is growing very rapidly – by approximately 62% by 2025;
- Development of a public will to use and fund a public transit system;
- Increase the frequency of routes that the Rogue Valley Transit District provides to the city;
- Must enhance the “loser cruiser” image of the current transit system;
- Create a sense of community on the bus among bus riders;
- Create incentives to ride the bus; and
- Increase community involvement.

Talent's transportation/land use goals:

- Provide a safe and efficient system that provides options for everyone;
- Enhance pedestrian and bicycle infrastructure;
- Improve connectivity for all modes throughout Talent ; and

- Maintain livability, while allowing for growth and economic expansion.

Obstacles to implementing transportation-efficient land use principles:

- Lack of available funding mechanisms;
- Limits on how to use available funding;
- Difficulty determining how to pay for the capital improvement plan, and how to prioritize projects as community needs change;
- Talent does not have enough staff to work on economic development activities;
- People are centered on their own lives – most people do not understand the planning process and that they can make a difference;
- People do not want to change; they feel that any change is negative; and
- People from southern California do not think that there is a problem because Talent is not as crowded or congested as Los Angeles.

Tools that are available to address transportation and land use issues:

- Local zoning code;
- Regional planning efforts;
- Long-range planning efforts;
- Local planning staff that brings technical information to the planning commission;
- Field trips for the planning commission; field trips offer examples in tangible form, providing the history, who was involved, and the outcome;
- Community involvement activities; and
- Planning commissions in the Rogue Valley should get together and collaborate, to hear what is going on in surrounding areas.

Kinds of assistance needed to help implement land use and transportation goals:

- Assistance with establishing collaborative planning;
- Information about ways to fund projects;
- Information and assistance with economic development;
- Additional outreach provided by local DLCD representative; and
- Publications that provide code assistance.

Ideal formats for assistance:

- *Workshops.* Presentation and discussion in addition to interactive activities;
- *Training assistance grants.* Assistance securing funding;
- *Planning events.* Collaborative events for all commissioners in the region;
- *Videos, audio-cassettes, and electronic media.* Provide alternative means of disseminating information;
- *Telephone training modules.* Conversations between experts to hear about ideas from other parts of the country; and
- *Communication.* Commissioners prioritizing the most important elements of planning in the community.

Written Evaluation

After the workshop, Talent commissioners and staff completed an evaluation form . The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. One staff member, six planning commissioners, and one parks commissioner completed the evaluation. Key findings included:

- Most of the planning commissioners responded to the question of how long they had been in the position. The average length of time was 3.6 years, with the range of 1-8 years.
- Six of the eight participants indicated that they had heard of the TGM Program before the workshop.
- When asked what form they would like to see the written information in, two participants wanted paper based material, one wanted web based material, and four wanted paper and web based material.
- Prior to our presentation, the planning commissioners had a wide range of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.5 regarding level of knowledge, with the responses ranging from 1-5.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the presenter was effective (See Table C-6).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (See Table C-6).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-6. All eight of the respondents provided an answer to each of the questions provided in Table C-6.

Table C-6. Evaluation Criteria & Mean Response of Talent Planning Commission Workshop.

Evaluation Criteria	Response (Mean)
Presentation	
The topics covered are timely	4.6
The information presented was useful	4.6
I learned something new	4.4
The presenters were effective	4.6
The computer presentation was effective	3.8
I will use some of the ideas presented today in my work as a planning commissioner	4.0
Discussion/Focus Group	
The discussion covered issues that are important in our community	4.3
There was enough time to discuss the issues	4.3
The facilitator did a good job focusing the discussion	4.4
The discussion generated some useful ideas	4.1

Lessons Learned

CPW learned the following lessons during the Talent workshop:

1. Using the term 'smart growth' and its related principles did not aggravate or create confusion for any of the commissioners.
2. CPW met with Mr. Cronin, City of Talent Planning Director, before the workshop to discuss transportation and land use issues in Talent and to identify ways to make the presentation and discussion more meaningful for the commissioners. CPW gained valuable information from this and will try to arrange initial meetings with planning staff in each of the remaining communities.

3. The facilities in the Community Center required CPW to use a semicircle arrangement of chairs for the planning commissioners. The arrangement provided an informal setting unlike what is normally used in the Talent commission meetings. The resulting discussion was very different from those conducted in the previous workshops. All of the Talent commissioners were active participants throughout the discussion. CPW feels that the informal setting was beneficial for generating the high level of participation and will experiment with this arrangement in the remaining workshops.
4. Mr. Cronin, City of Talent Planning Director, had taken the commissioners on field trips as an educational tool to provide them with on the ground examples of development exhibiting many of the 'smart growth' principles. The commissioners stated that the trips enhanced their knowledge and expressed interest in additional trips.

Medford and Jackson County Joint Planning Commission Workshop

CPW conducted the seventh workshop with the Medford and Jackson County Planning Commissions on Monday, April 28, 2003, from 11:30 to 1:00 p.m. at Medford's City Hall conference room. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and transit-oriented development.

Participants included:

Eileen Adee, Medford Joint Transportation Sub-Committee
Jason Anderson, Medford Planning Commission
Cory Crebbin, Medford Public Works Director
Sydney Dreyer, Medford City Attorney's Office
Stuart Foster, OTC
Mark Gallagher, Medford Principal Planner
Ernest Garb, Medford Joint Transportation Sub-Committee
Boyd Gibson, Medford Planning Commission
Don Greene, Jackson County Planning Commission
Jay Harlosrud, Jackson County Planner II
Reeve Hennion, Jackson County Planning Commission
Tod Hunt, Medford Planning Commission
Paul Korbulk, Jackson County Planning Director
Jim Maize, Medford Principal Planner
Gene Martin, Medford Joint Planning and Land Use Sub-Committee
David McFadden, Medford Planning Commission
Suzanne Myers, Medford Associate Planner
Norm Nelson, Medford Planning Commission
John Renz, DLCD South Oregon Representative
Rob Scott, Medford Planning Director
Bob Tull, Medford Planning Commission Chair
Ali Turiel, Manager, Jackson County Planning
Steve Wadleigh, Medford Engineering
Raul Woerner, Jackson County Planner III

This summary includes: (1) a summary of the discussion following CPW's presentation about smart growth and transit-oriented development; (2) a

summary of the discussion about transportation and land use connections; (3) the results of the workshop evaluation; and (4) the key lessons learned.

Meeting Structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about transit-oriented development (TOD). Following the presentation, participants engaged in an interactive discussion about TODs, current transportation and land use issues in the Medford region, and barriers to implementing efficient land use and transportation elements. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

CPW structured the presentation to determine the perceptions of smart growth within the community. In Medford, most people indicated that they had heard of smart growth. One participant stated that we need a new term for smart growth. When CPW asked if the phrase “good planning” would work, another participant said that smart growth is a specific type of good planning, which includes mixed-use development, adequate transportation routes and multi-model transportation.

During the discussion of the presentation, one participant raised the issues of how to incorporate smart growth principles within a Wal-Mart and how the city could require Wal-Mart to build a second floor for residential units. The proposed site for the new Wal-Mart is a nice area close to open space and commercial development, making it a good location for housing. The participant expressed a preference for the Wal-Mart to have a landscaped parking lot. CPW responded that explicit code has to be in place to direct Wal-Mart to develop differently, otherwise they will build their standard store. As development happens, the community needs a vision and backbone to have concepts of smart growth appear on the ground.

Another participant pointed out that if a community wants the federal government to subsidize projects, then long-term thinking is needed to prepare for the future.

One participant mentioned that Medford is working to make sure that the four proposed TOD sites are pedestrian friendly, and then they will focus more energy on making sure the rest of the community becomes pedestrian friendly.

Medford planning staff pointed out that the Southeast Plan has taken ten years to develop, but it has been patiently coming along. Another challenge for that area is the infrequent service that the Rogue Valley Transit District (RVTD) provides. RVTD runs on 30 and 60 minutes headways, with the last bus ending at 6:00pm on the weekdays and no service on the weekends. The city does not have any involvement with the public transportation system.

CPW responded that it is a common situation for other public transportation systems. Public transportation is funded from the gas tax and federal government subsidies. RVTD can work with the city on land use and transportation. The only city that CPW has heard about that does invest in public transportation is Ashland.

One participant asked CPW about the order of what should be developed first, commercial or housing components, and what role the government should play. CPW responded by reflecting on a mixed-use development example, Broadway Place in Eugene, where there is an altruistic developer who charges the commercial tenants a portion of their revenue. If the tenants do not make any money, the developer does not either.

One person asked about the strategies of creating TODs and which is more effective, starting from scratch or infill and redevelopment. CPW responded that the market has a major role in creating TODs, and the success of TODs depends on what the market will support. Specific area plans that create policies are good way to start, keeping in mind that one TOD can be a public activity center and another node can be more centered around commercial development.

The conversation moved to the regional aspects of land use and transportation planning and emphasized that more can be done. Intergovernmental agreements are important. There are two good examples of intergovernmental agreements in Medford. The first is one in which the city and county are working together on the Bear Creek Greenway. The second is the coordination between the city and school districts to maintain recreation fields. A participant stated that requiring Wal-Mart to build two stories would most likely encourage Wal-Mart to build a store in a neighboring smaller city and that intergovernmental agreements would prevent this from happening.

One participant mentioned an example of a nearby mixed-use development, the Four Oaks Center in Central Point. The Center is three-story vertical housing structure with ground floor retail.

Following the discussion of the presentation, CPW engaged the commissioners and staff with a series of questions regarding Medford's transportation and land use issues, barriers to implementing their goals and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the participants identified the following issues.

Transportation and land use issues:

- Balancing urban growth while maintaining an agricultural base;
- Encouraging businesses and offices to move back to the downtown;
- Balancing road improvements with bicycle and pedestrian improvements;

- Creating buffer areas and reserving lands for parks and recreation in new development;
- Understanding what makes cities livable;
- Planning for current recipients while providing for new development; and
- Balancing connectivity while preserving old neighborhoods.

Tools that are available to address transportation and land use issues:

- Design guidelines;
- Transportation system plan;
- Future neighborhood plans;
- Joint transportation sub-committee;
- Urban renewal; and
- Transportation funding committee.

Obstacles to implementing transportation-efficient land use principles:

- Transportation system serves more people than live in the jurisdiction; many people live outside of Medford but work in the city;
- People do not want increased connectivity or streets in their neighborhoods;
- Measure 56 requires public notices be sent to all land owners about changes to land use ordinances and zoning, which becomes a financial burden;
- Information deficiency because of a lack of a university close by to help with research. An example of this is that the city wants to conduct an economic analysis, and the only nearby service to do this is the COG and they are busy;
- Fire codes that require wide streets that are not compatible with the smart growth principles;
- Freeway that runs through the city which hurts connectivity, but is beneficial to the community's economy;
- Centrally located airport that impacts transportation and land uses;
- Hard to encourage development to be built at higher densities;
- Code is antiquated;
- Smart growth development that is not thought out presents poor examples and gives smart growth a bad name; and
- Transportation Planning Rule hinders smart growth initiatives.

Kinds of assistance needed to help implement land use and transportation goals:

- More opportunities for the planning commission to interact with staff and planning commissioners from other jurisdictions;
- City does provide APA membership for the planning commissioners and sends them to OPI and national conferences;
- The planning commission relies on staff for information; and
- State as a resource rather than regulator.

Written Evaluation

After the workshop, the Medford and Jackson County commissioners and staff completed an evaluation form . The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. There were eight planning commissioners, five planning staff, two planning directors, two joint transportation sub-committee members, one public works staff, one DLCD Representative, and one joint transportation and land use sub-committee member. Key findings included:

- Most of the participants responded to the question of how long they had been in the position. The average length of time was 4.8 years, with the range of 2-7 years.
- Only one out of the 21 participants indicated that they had not heard of the TGM Program before the workshop.
- When asked what form they would like to see the written materials, the majority would like to have paper and web based educational materials, (12 responses), while four responds indicated that they would like paper based and only three would like both.
- Prior to our presentation, the participants had a moderate to above average amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 4.2 regarding level of knowledge, with the responses ranging from 2-5.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (See Table C-7).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (See Table C-7).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a

scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-7. All nine of the respondents provided an answer to each of the questions provided in Table C-7.

Table C-7. Evaluation Criteria & Mean Response of Medford and Jackson County Planning Commissions Workshop.

Evaluation Criteria	Response (Mean)
Presentation	
The topics covered are timely	4.3
The information presented was useful	3.7
I learned something new	3.2
The presenters were effective	3.9
The computer presentation was effective	3.8
I will use some of the ideas presented today in my work as a planning commissioner	3.7
Discussion/Focus Group	
The discussion covered issues that are important in our community	4.3
There was enough time to discuss the issues	3.6
The facilitator did a good job focusing the discussion	3.9
The discussion generated some useful ideas	3.5

Lessons Learned

CPW learned the following lessons during the Medford/Jackson County workshop:

1. The community appreciates local pictures in the PowerPoint presentation.
2. CPW's research of Medford's plans for TODs was helpful for the discussion.
3. A round table or board table encouraged a more engaging discussion.
4. A mix of staff, planning commissioners and DLCD representative worked well for discussion. Many people indicated that they were glad to hear other people's views.

5. Communities would like to see more smart growth examples that have been implemented.
6. Flexible times for the workshop agenda items worked well, thus allowing discussions the time they need.

Reedsport Planning Commission Workshop

CPW conducted the eighth workshop with the Reedsport Planning Commissions on Tuesday, May 27, 2003, from 7:30 to 9:00 p.m. at Reedsport Council Chambers. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and transportation system plans.

Participants included:

Bill Beald, Reedsport Planning Commissioner
Sid Boddy, Reedsport Planning Commissioner
Janelle Evans, Reedsport Planning Director
Marc Fullhart, Reedsport Planning Commissioner
Vera Koch, Reedsport Assistant to City Manager
Chuck Mandala, Reedsport Planning Commissioner
Dal Mandala, Reedsport Resident
Art Roy, Reedsport Planning Commissioner

This summary includes: (1) a summary of the discussion following CPW's presentation about smart growth and transportation system plans; (2) a summary of the discussion about transportation and land use connections; (3) the results of the workshop evaluation; and (4) the key lessons learned.

Meeting Structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about transportation system plans (TSP). Following the presentation, participants engaged in an interactive discussion about TSPs, current transportation and land use issues in Reedsport and barriers to implementing efficient land use and transportation elements. At the end of the workshop, participants completed a written workshop evaluation.

Meeting Summary

CPW structured the presentation to determine the perceptions of smart growth within the community. When asked to define the term "smart growth", many commissioners were familiar with the concept. One commissioner stated that smart growth is looking to the future when making decisions and having good master plans.

Many of the planning commissioners were skeptical about the applicability of smart growth strategies in rural towns. The Planning Director stated that ODOT has a book about smart growth strategies in rural areas, but the strategies are difficult to implement especially in communities that are not experiencing growth. Reedsport, for example, does not allow mixed-use

development in their current code. One planning commissioner shared that half of the population in Reedsport is over the age 65. It is difficult to get people out of their car because the older people are less mobile. Because the population of Reedsport is declining, one commissioner did not feel that smart growth strategies applied to the town; however, because there is some hope that the City will grow in the future the city should begin to plan for growth. Other commissioners indicated that the community is very car dependent, and therefore the market will limit smart growth in Reedsport.

Following the discussion of the presentation, CPW engaged the commissioners and staff with a series of questions regarding Reedsport's transportation and land use issues, barriers to implementing their goals and types of assistance needed to help them better integrate transportation and land use planning. During the course of the discussion, the participants identified the following issues.

Transportation and land use issues in the next five years:

- Funding – lack of funding for repaving streets;
- Transportation options for elderly are disappearing; Reedsport is about to lose the dial-a-ride service, and there is no taxi service;
- Taxes - current taxes are capped and can not be increased which caused the city to turn off one-third of their street lights;
- Zoning - the current code does not allow restaurants near waterfront; and
- Improving bicycle paths - as part of the coast bicycle route the City wants to place a bicycle lane on the dock.

Transportation and land use issues in the next 20 years:

- Transportation options for the disabled and older community; and
- Road improvements.

Tools that are available to address transportation and land use issues:

- Grants;
- Transportation System Plan;
- Street calming devices; and
- Access management plans.

Obstacles to implementing transportation-efficient land use principles:

- Lack of perceived need to change current planning strategies ;
- Declining population;

- Limited new jobs;
- Lack of buildable land to expand due to topography;
- Declining tax revenues;
- Lack of agreement about the safety of narrow streets;
- ODOT standards for access are not congruent with City's needs; and
- Community and City skepticism about the necessity of the TSP.

Kinds of assistance needed to help implement land use and transportation goals:

- Funding;
- Strategic visioning;
- Technical assistance to work on land use plans ;
- Information about how to involve/inform the public; and
- Better coordination with the state to solve transportation issues.

Written Evaluation

After the workshop, the Reedsport commissioners and staff completed an evaluation form . The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. There were four planning commissioners, one planning director, one city staff and one resident present at the workshop. Key findings included:

- Most of the participants responded to the question of how long they had been in their position. The average length of time was 3.8 years, with the range of 3-7 years.
- Only one out of the 8 participants indicated that he/she had not heard of the TGM Program before the workshop.
- When asked what form they would like to see the written materials in, the majority would like to have paper based educational materials, (four responses), while two responses indicated that they would like paper and web site based.
- Prior to our presentation, the participants had a moderate to low amount of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 2.3 regarding level of knowledge, with the responses ranging from 2-4.

- Commissioners somewhat agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (See Table C-8).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (See Table C-8).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-8. All eight of the respondents provided an answer to each of the questions provided in Table C-8.

Table C-8. Evaluation Criteria & Mean Response of Reedsport Planning Commission Workshop.

Evaluation Criteria	Response (Mean)
Presentation	
The topics covered are timely	3.4
The information presented was useful	3.1
I learned something new	3.4
The presenters were effective	3.6
The computer presentation was effective	3.6
I will use some of the ideas presented today in my work as a planning commissioner	2.8
Discussion/Focus Group	
The discussion covered issues that are important in our community	3.0
There was enough time to discuss the issues	4.3
The facilitator did a good job focusing the discussion	4.0
The discussion generated some useful ideas	3.0

Lessons Learned

CPW learned the following lessons during the Reedsport workshop:

1. It is important for workshop presenters to understand community growth patterns and demographics. Age demographics may be a factor when implementing smart growth principles.

2. Communities would like to learn more about smart growth projects that have been implemented.
3. It is important to explain how smart growth principles apply to rural communities with declining populations.
4. It was beneficial to hear viewpoints of those who oppose smart growth, so that the project will have a realistic sample of perceptions in rural Oregon.

Coburg Planning Commission Workshop

CPW conducted the ninth workshop with the Coburg Planning Commission on Wednesday, June 4, 2003, from 8:30 – 9:00 p.m. in the Coburg City Hall. The specific purpose of the workshop was to discuss community transportation and land use issues.

Participants included:

Anita Yap, Planning Director, City of Coburg

Mike Hudson, City Administrator

Pat Greenwell, Planning Commissioner

Russell Read, Planning Commissioner

Dan Claycomb, Planning Commissioner

Ken Donner, Planning Commissioner

Patricia McConnel, Planning Commissioner

Joey Galyes, Planning Commissioner

This memorandum includes: (1) a summary of the discussion about transportation and land use connections, and (2) the key lessons learned.

Meeting Structure

Unlike other workshops in this project, CPW did not give a PowerPoint presentation on smart growth because of time constraints. Instead, CPW gave a brief overview of the TGM Outreach Project, and then engaged participants in an interactive discussion about current transportation and land use issues in Coburg, barriers to implementing their land use and transportation goals, and assistance they would like to receive.

Meeting Summary

During the course of the discussion the planning commissioners identified the following issues.

Coburg transportation and land use issues:

Short term - 5 Years

- Currently, the community does not have a citywide sewer system and operates with septic tanks. A sewer system will be installed in the community in the near future at which time the current moratorium on growth will be lifted.
- As the population grows, increasing density will need to be considered.
- Coburg is the opposite of a bedroom community - more people commute into the community to work than commute out.

- The I-5 interchange is out of date – it not safe for pedestrians, there is lots of traffic in the morning and evenings, and it is not well connected with local streets.
- The current transportation system experiences system-wide failures. What will happen to the city’s transportation system when infill is added and density is increased?
- The safety of the streets may be compromised as traffic increases.

Long term - 20 Years

- With an increased sewage capacity, the industrial make-up of the town might change, thereby creating different transportation demands.
- Currently, the community is located on the west side of the interstate. Coburg is considering developing on the east side of the freeway in the future. This will present connectivity issues.
- Traffic problems will continue to increase as the community grows.

Barriers to implementing transportation-efficient land use principles:

- Limited local control because “LCDC mandates what we can do and what we cannot do.”
- Some ODOT standards are incompatible with local needs – “ODOT is concerned about mobility standards not livability standards.”
- Some TGM proposed standards are not appropriate for small towns
- Limited examples of smart growth projects in small towns
- Community members advocate for “no-growth”
- Code amendments have not been adopted into the code; it is difficult to enforce ordinances that are not officially part of the code
- Limited money to hire consultants to develop the TSP and Buildable Lands Inventory
- Limited staff to work on planning issues
- Large income disparity between residents

Tools that are available to address transportation and land use issues:

- Planning staff
- Transportation System Plan
- TGM grants – smart development code assistance
- Active mayor

Kinds of assistance needed to help implement land use and transportation goals:

- Technical assistance about architectural design of infill. What should the houses look like? How can we assure that the historic area will be maintained with increased infill?
- Grants – money for planning and implementation
- Training workshops – workshops should be close by, in the evening (best time is 7:00 – 9:00 p.m.), and of short duration; an Internet conference would also be appropriate
- Examples of smart growth projects and ordinances appropriate for small communities
- More information about how to engage the entire community in the planning process.

Written Evaluation

Due to time constraints, we did not administer the evaluation form during the workshop.

Lessons Learned

CPW learned the following lessons during the Coburg workshop:

5. Thirty minutes for a discussion is not enough time to thoroughly discuss desired topics; however, the planning commissioners were pleased that their comments would be heard by the state and felt that the conversation was worthwhile.
6. It is unlikely that the planning commissioners will mail back the evaluation forms. Leave enough time in the meeting to complete the forms.
7. Understanding a few local issues is paramount for a successful conversation.

Canby Planning Commission Workshop

CPW conducted the 10th workshop with the Canby Planning Commission on Monday, June 9, 2003, from 6:00 to 7:00 p.m. at Canby City Hall. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and subdivisions that incorporate smart growth principles.

Participants

John Williams, Community Development & Planning Director

Matilda Deas, Project Planner

Bob Able, Planning Commissioner

Jim Brown, Planning Commissioner

Geoffrey Manley, Planning Commissioner

Paul Thalsofer, Planning Commissioner

This memorandum includes: (1) a summary of the discussion following CPW's presentation about smart growth and subdivisions; (2) a summary of the discussion about transportation and land use connections; and (3) the key lessons learned.

Meeting Structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and case studies of subdivisions that incorporate smart growth principles. Following the presentation, participants engaged in an interactive discussion about subdivisions, current transportation and land use issues in Canby, and barriers to implementing transportation and land use planning.

Meeting Summary

CPW structured the presentation to determine the perceptions of smart growth within the community. The majority of the commissioners did not like using the term "smart growth" to describe planning that encourages transportation options, mixed-use development, human scale designs, and efficient use of infrastructure. One commissioner described the term as a "coin phrase" that has been overused. According to him there is growth with planning and there is growth without planning – there is no need to label growth with planning as "smart".

Canby has recently completed its periodic review at which time they revised their code to provide for many smart growth strategies. According to one commissioner, the periodic review process was a paradigm shift that will

help make the City a better place to live. The city has a PUD zone that allows mixed use, a mixing of housing types and narrow streets. Unlike some communities, the planning commission and city council support smart growth principles, but they cannot find developers who want to begin smart growth projects in their town. The commission would like a case study of a city that had mandatory smart growth standards and made developers conform to them. They would like more information about enticing developers to create subdivision in which they take full advantage of the revised codes.

The planning commissioners believed that cost per dwelling unit in subdivisions that incorporate smart growth principles is higher. They are afraid that if the City puts restrictions on development as a way to encourage smart growth. One commissioner suggested making it more expensive not to include certain “smart growth” elements in a project. The city must decide if its role is to let the market dictate development or intervene to encourage types of development that may not be completely market driven.

Transportation and land use issues:

- High maintenance costs of transportation infrastructure
- Difficulty building new streets when there are so many maintenance issues
- Housing costs are going up and affordable housing is becoming scarce
- A highway and railroad bisect the town; Canby has no control over these two transportation routes

Obstacles to implementing transportation-efficient land use principles:

- Lack of funding for new roads
- Lack of developers wanting to take advantage of revised code
- Lack of incentives to offer developers who build smart growth projects
- Limited large parcels of vacant land within UGB – prevents large scale master-planning of new subdivisions
- Transportation plans do not extend beyond the UGB even though it is important to understand the entire system

Kinds of assistance needed to help implement land use and transportation goals:

- Case studies of subdivisions that have incorporated parks into their site plans
- Strategies for economic development

- Financial implications of smart growth projects – Do they cost the city more or less?
- Resource guide with pictures of smart growth “best practices”
- Growth modeling software that enables citizens and staff to learn about and visualize possible growth scenarios
- Ability to connect with developers who are willing to plan and build subdivisions that incorporate smart growth strategies

Written Evaluation

Due to time constraints, CPW did not administer the evaluation form during the workshop.

Lessons Learned

CPW learned the following lessons during the Canby workshop:

1. Planning commissioners are eager to learn about case studies and appreciate details about implementation.
2. Planning commissioners are more likely to discuss topics amongst themselves if they are sitting around a table instead of sitting at their formal meeting desks.
3. Planning commissioners become engaged in the topic if it is a current community issue.

Toledo Planning Commission Workshop

CPW conducted the eleventh workshop with the Toledo Planning Commission on Wednesday, June 11, 2003, from 7:15 – 8:30 p.m. at Toledo's City Hall. The specific purpose of the workshop was to discuss issues involved with transportation-efficient land use and transportation system plans.

Participants

Rusty Klem, Community Development Coordinator

Pete Wall, City Manager

Arlene Inukai, Planning Secretary

Misty Lambrecht, City Councilor

Joyce Mackenroth, Planning Commissioner

Nic Dahl, Planning Commissioner

Art Anderson, Planning Commissioner

Dana Scarborough, Planning Commissioner

Anne Learned-Ellis, Planning Commissioner

This memorandum includes: (1) a summary of the discussion following CPW's presentation about smart growth and transportation system plans; (2) a summary of the discussion about transportation and land use connections; (3) the results of the workshop evaluation; and (4) the key lessons learned.

Meeting Structure

CPW began the workshop with a presentation focusing on the connection between transportation and land use, the principles of smart growth, and information about transportation system plans (TSP). Following the presentation, participants engaged in an interactive discussion about TSPs, current transportation and land use issues in Toledo, and barriers to implementing efficient land use and transportation elements. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

Three transportation routes that are in need of improvement surround the City of Toledo; however, the City does not have control over them. The Commission indicated that to accommodate the transportation needs of the City and the greater region, Highway 20 needs to be widened, Yaquina

River should be dredged, and the railroad line needs to be improved. According to the commissioners, development in Toledo cannot occur until some of the outside transportation linkages are improved.

One commissioner was skeptical of the appropriateness of creating a TSP because the major transportation issue in the city is the lack of control of Hwy. 20 and nothing can be done until the state decides to make improvements. Furthermore, the city does not have adequate funds or resources to develop a comprehensive TSP. Toledo's city planner considers the creation of the TSP as a positive activity for the city rather than merely a fulfillment of a state mandate. When asked how he will complete the TSP he said that he would rely on the planning commission, himself, and outside volunteers.

Transportation and land use issues:

- The economy of the city is constrained by transportation routes not controlled by the city – Hwy. 20, Southern Pacific Railroad, Yaquina River.
- Highway 20 needs to be improved - Large trucks cannot use Hwy. 20 because it is too narrow. This limits business and industry in the City.
- Hwy 20 should be considered a major highway linking the mountains with the coast
- Business Hwy. 20 is considered a “frontage road” - until it is re-classified the city can not receive grants to upgrade the road.
- Yaquina river needs to be dredged .
- Significant slopes limit pedestrian travel through town.
- Lack of sidewalks.
- Limited vision at some intersections.
- Lack of curbs.
- Lack of funding for new street development and maintenance.
- Lack of review of platted, undeveloped streets to ensure the appropriateness of their locations.
- High percentage of sub-standard streets - Enforcing standards for fully-developed streets will be labor intensive and complicated.
- Narrow streets, the abundance of hills, and lack of funding prohibit developing pedestrian/bicycle lanes
- Some community members do not want change to occur in the city.

Tools that are available to address transportation and land use issues:

- Street standards - these standards should be reviewed to ensure that they continue to fit the community
- Subdivision ordinance
- TSP

Kinds of assistance needed to help implement land use and transportation goals:

- Funding for transportation improvements
- Information about how to acquire funding for transportation improvements - Where do we go to apply for grants?
- Highway 20 improvements
- Additional staff to complete inventory work for TSP
- Assistance with negotiations/discussions with the Southern Pacific railroad
- Data from the state in electronic formats and hardcopies (e.g. steep slopes map, population projections)
- Student interns to assist with planning functions
- Information about the RARE program sponsored by the University of Oregon

Preferred formats for technical assistance:

- Internet and publications are the most helpful
- Workshops are beneficial, but are difficult to attend because of scheduling
- Training videos could be helpful

Written Evaluation

After the workshop, the Toledo planning commissioners and staff completed an evaluation form (Attachment 1). The purpose of the form was to provide CPW with information on how to improve the workshop for other communities. There were six planning commissioners and one planning director who completed the evaluation. Key findings included:

- Most of the participants responded to the question of how long they had been in the position. The average length of time was 4.9 years, with the range of 1-20 years.
- Only two out of the seven participants indicated that they had heard of the TGM Program before the workshop.

- When asked what form they would like to see the written materials, the majority would like to have both paper and web based educational materials, (5 responses), while one respondent indicated that he/she would like paper based and one would like web based.
- Prior to our presentation, the participants had a moderate level of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 3.1 regarding level of knowledge, with the responses ranging from 1-5.
- Commissioners agreed that the information presented in the PowerPoint presentation was timely and useful and that the discussion generated useful ideas (Table 1).
- Commissioners were equally satisfied with the discussion element of the workshop and the PowerPoint presentation (Table 1).

A portion of the evaluation form included questions regarding the presentation and the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form (Attachment 1) and the mean responses are contained below in Table 1. All seven of the respondents provided an answer to each of the questions (except the sixth one which received 6 responses) provided in Table 1.

Table C-9. Evaluation Criteria & Mean Response of Toledo Planning Commission Workshop.

Evaluation Criteria	Response (Mean)
Presentation	
The topics covered are timely	3.7
The information presented was useful	3.6
I learned something new	3.9
The presenters were effective	4.1
The computer presentation was effective	4.1
I will use some of the ideas presented today in my work as a planning commissioner	3.5
Discussion/Focus Group	
The discussion covered issues that are important in our community	3.4
There was enough time to discuss the issues	3.9
The facilitator did a good job focusing the discussion	4.4
The discussion generated some useful ideas	3.9

Lessons Learned

CPW learned the following lessons during the Toledo workshop:

1. The timing of the workshop was beneficial because the city is about to begin working on their TSP. The presentation gave a good overview of what to expect in the planning process.
2. Toledo is dealing with many of the same issues identified in other communities; however, due to its location and size it experiences other transportation and land use issues that were not raised in other cities. It is important to diversify the location and size of cities when trying to understand the range of transportation and land use issues within the state.
3. Small communities with a small planning staff heavily rely on technical assistance from the state because of the limited local resources.

Redmond Planning Commission Workshop

CPW conducted the twelfth workshop with the Redmond Planning Commission on Monday, June 16, 2003, from 5:30 to 6:45 p.m. at Redmond City Hall. The specific purpose of the workshop was to discuss transportation and land use planning issues and smart growth concepts.

Participants included:

Chuck McGraw, Senior Planner
Jo Anne Sutherland, City Manager
Betty Borgen, Assistant to City Manager
Walter Taylor, Planning Commissioner
Bob Bleile, Planning Commissioner
Annette Turpin, Planning Commissioner
Stanley Clark, Planning Commissioner
Joe Mansfield, City Councilor
Jay Patrick, City Councilor
Paul Hathaway, City Councilor
Eric Porter, Associate Planner
Amy Barry, Associate Planner
Jeff England, Planning Department

This memorandum includes: (1) a summary of the discussion; and (2) the key lessons learned.

Meeting Structure

In this workshop, CPW deviated from the standard workshop format that we have used in other communities. Because Redmond currently has a number of planning efforts underway we anticipated many questions about smart growth, we did not use the PowerPoint presentation and structured the evening to consist of an hour and a half discussion.

Meeting Summary

When asked to define the term “smart growth”, only two of the commissioners indicated that they had heard of the term. The commissioners began the discussion about smart growth by talking

about affordable housing issues. Because Redmond has grown so quickly, one commissioner stated, the town has not been able to address its problems holistically. Currently, there is little affordable housing. People come to Redmond because they cannot afford Bend; however, Redmond is more expensive and less accessible to all income levels. Bob Parker, CPW, suggested that they City should look at their code to see if there are barriers to providing affordable housing. Is there enough accessible and appropriate land zoned for multi-family development? The state has already made it illegal to adopt inclusionary zoning ordinances.

One of the major concerns of the commissioners is the rapid rate of growth in Redmond. Unlike many other Oregon cities, the recession has not hit Redmond. The growth of the community has many implications – demand for health services, parks, industrial space, recreation services, streets, and lighting. According to one commissioner, it is getting hard to pay for schools. In addition, according to another commissioner, there is little for seniors to do in Redmond. The kind of activities that they demand are different than they use to be – only seniors over age 70 are using the senior center.

In light of the rapid growth, many of the commissioners wanted to learn about the benefits of smart development and ways to plan for it. Potential benefits include more efficient use of services, reduced traffic congestion, mix of housing types, and more livable communities. To plan for smart growth projects, cities need to look at their comprehensive plan and their code and subdivision ordinances to see if they allow for smart growth strategies. Do they permit mixed-use zoning, a planned unit develop zone, narrow streets, a mix of housing types? Redmond already requires pedestrian connections in all subdivisions, and has regulation about providing solar access. The senior planner posed the question to the workshop participants, “What shape do we want our urban form?” As Redmond continues to grow this will be an important question to consider.

Another important discussion topic was - How do you achieve a livable community through smart growth? For example, how does transportation and land use planning provide seniors something to do and a place to do it? One commissioner said that one component is public transportation such as dial-a-ride. Bob Parker noted that usually a community needs a population of at least 25,000 before the state requires a public transit feasibility analysis. Planning for transit is an important element of smart growth for growing communities. Smart growth concepts are not against the automobile, rather, it encourages providing neighborhoods that meet daily needs and services within a short drive or walk.

One strategy for implementing smart growth strategies is to identify neighborhood activity centers through the development of a “floating” commercial node. One commissioner asked about the placement of nodes within the community. How far apart do we place the nodes?

What kinds of services will the node support? The literature on TODs indicates that they should be spaced one mile apart; however this may not be appropriate for all communities. A full-service grocery store needs a population base of about 4,000 – 6,000 people to support – these types of numbers may help communities site their potential neighborhood activity centers. One commissioner was skeptical of the idea of neighborhood activity centers, she stated, “If people have time, people will go to all the stores,... always shop the pocket book.”

The commissioners wanted to learn more about successful smart growth projects in Oregon. One commissioner asked, “What makes a project a success?” This is an important question to consider when discussing case studies or planning for projects. The concept of success can be measured in many different ways depending on if it is the developer, the city planner or the citizen.

Obstacles to implementing smart growth principles/integrating transportation and land use planning:

- ODOT standards are not compatible with local needs
- Lack of local control over some decisions
- Lots of development occurred before code change was adopted
- Huge population growth – limited funds to pay for needed infrastructure
- Lack of understanding of the implication of many smart growth concepts – What is the reality of mixing residential with industrial/commercial?
- Lack of precedents for smart growth projects
- Limited by topography (canyon), railroad, and current urban form

Kinds of assistance needed:

- Money and resources (staff and accurate data) for plan development and updating codes
- Access to studies about siting retail uses – How much land does a business need? How much population does a grocery store need to support it? How do businesses decide where to site their stores?
- Simple websites that are easy to use
- Workshops
- Information about placement of adult businesses
- Statewide searchable database on case studies that describes the site, mix of uses, and financial package

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Written Evaluation

Due to time constraints, the written evaluation was not administered during this workshop.

Lessons Learned

CPW learned the following lessons during the Redmond workshop:

1. Using the PowerPoint presentation in the beginning of the workshop would have been helpful to provide basic definitions of concepts and structure the discussion.
2. The mix of city councilors and planning commissioners was beneficial to the discussion.
3. It is important to encourage everyone to participate in the discussion.

Gladstone Planning Commission Workshop

CPW conducted the final planning commission workshop on Tuesday, June 17, 2003 at the Gladstone City Hall. The planning commission meeting began at 7:00 p.m., but the CPW discussion did not take place until 10:00 p.m to 10:30 p.m. The specific purpose of this workshop was to discuss issues involved with transportation and land use planning in the community of Gladstone.

Participants included:

Jonathan Block, Gladstone City Recorder
Hal Busch, Planning Commission Chair
Carolyn Briggs, Planning Commissioner
Larry Douglas, Planning Commissioner
Lendon Nelson, Planning Commissioner
Neal Reisner, Planning Commissioner
Randy Rowlette, Planning Commissioner
Kim Sheckmann, Planning Commissioner

This memorandum includes: (1) a summary of the discussion about transportation and land use in Gladstone; (2) the results of the workshop written evaluation; and (3) the key lessons learned.

Meeting structure

Unlike other workshops in this project, CPW did not give a PowerPoint presentation on smart growth because of time constraints. Instead, CPW gave a brief overview of the TGM Outreach Project, and then engaged participants in an interactive discussion about current transportation and land use issues in Gladstone, barriers to implementing their land use and transportation goals, and assistance they would like to receive. At the end of the workshop, participants completed a written workshop evaluation that will aid in the development of future workshops.

Meeting Summary

During the course of the discussion the planning commissioners identified the following issues.

Gladstone transportation and land use issues:

- Two major highways, I-205 and McLoughlin Boulevard, run through Gladstone, and there is no way to limit the “pass-through” traffic;
- Plans for the metropolitan region, done by Metro, appear to primarily address issues of population growth and expansion of urbanized land. Gladstone is “landlocked” (surrounded by other

cities), and is not growing in population, so Metro's plans seem to be less relevant to Gladstone than other parts of the Portland area. Metro's expansion of the urban growth boundary (UGB) to the east will result in more traffic on McLoughlin;

- Public transportation is insufficient; there are no park and ride lots; many people are forced to drive; MAX does not extend far enough to the east to keep traffic off of I-205; it takes much longer to ride the bus downtown than to drive;
- Gladstone is surrounded by other cities and receives lots of through traffic from other parts of the Portland region, there is a need to coordinate with neighboring jurisdictions;
- Downtown is not lively and well-used; one commissioner stated he remembers when Gladstone was a "real town;"
- There are a number of bicycle paths through different parts of the city, but connections between these need to be improved; and
- There is insufficient parking and road capacity to accommodate the traffic demands in Gladstone.

Obstacles to implementing transportation-efficient land use principles:

- Lack of technical knowledge about how traffic is managed or measured;
- Lack of coordination between city council and planning commission;
- Lack of an updated City comprehensive plan and vision for the future;
- Lack of funding for street repairs, upgrades, public process, community involvement;
- Difficulty acquiring money from Metro for transportation improvement projects;
- Reduction of City staff prohibits the City from sending representatives to many regional transportation meetings; and
- Lack of a comprehensive vision for transportation in Gladstone.

Kinds of assistance needed to help implement land use and transportation goals:

- Technical assistance in understanding traffic measurement and management;
- Funding not just for studies, but for implementing projects—need a "funding package" that would include monies for both planning the project and then building it;

- Internet assistance to get city codes and documents on-line (2 of the seven commissioners stated they use the Internet regularly for research, and another 2 use it occasionally);
- Funding and technical assistance on how to enhance the downtown corridor;
- Assistance with coordinating visioning city project; and
- Technical assistance about economic development strategies.

Written Evaluation

After the workshop, Gladstone planning commissioners completed an evaluation form . The purpose of the form is to provide CPW with information on how to improve the workshop for other communities. Seven planning commissioners completed the evaluation. Key findings include:

- Most of the planning commissioners responded to the question of how long they had been in the position. The average length of time for the 6 respondents was 7.5 years. Responses ranged from 3 to 12 years.
- Five of the seven planning commissioners indicated that they had heard of the TGM Program before the workshop.
- When asked what form they would like to see the written materials, there was a relatively equal distribution between participants wanting paper based (1 response), web based (2 responses), and paper and web based (2 responses) educational material.
- Prior to our presentation, the planning commissioners had an above average level of knowledge about the concepts presented in the workshop (smart growth concepts, integrating transportation and land use). On a scale from 1 to 5 (1 = I know nothing, 5 = I know a lot) the mean response was 4.0 regarding level of knowledge, with responses ranging from 3-5.

A portion of the evaluation form included questions regarding the focus group discussion. The respondents were given a scale from 1 to 5 for each question/criteria; 1 equaling 'Strongly Disagree' and 5 'Strongly Agree'. The questions/criteria contained on the evaluation form and the mean responses are contained below in Table C-10. Six of the respondents provided an answer to each the first three questions, and 5 respondents provided an answer to the fourth question provided in Table C-10.

Table C-10. Evaluation Criteria & Mean Response of Gladstone Planning Commission Workshop.

Evaluation Criteria	Response (Mean)
Discussion/Focus Group	
The discussion covered issues that are important in our community	3.8
There was enough time to discuss the issues	2.0
The facilitator did a good job focusing the discussion	4.2
The discussion generated some useful ideas	3.7

Lessons Learned

CPW learned the following lessons during the Gladstone workshop:

1. Scheduling a special work session instead of conducting a discussion as a part of a planning commission meeting is a more effective way to ensure an adequate amount of time is allotted.
2. If the presentation/discussion is to be part of a planning commission meeting, try to schedule a time slot early on the agenda.
3. It is important for workshop presenters to understand how a community fits into a larger regional area and how planning is (or is not) coordinated between jurisdictions in the region.

Appendix D

Minutes of Smart Growth Summits

The UO and PSU held two “summit” meetings during this project. The summits were intended as an opportunity for the two project teams to share information and to present findings to a broader audience. This appendix presents the minutes of the two smart growth summit meetings.

Summit 1

The UO organized and facilitated the first summit meeting. Kathryn Frank from the UO facilitated the meeting and prepared the meeting minutes.

Background

The first summit for the University of Oregon/Portland State University TGM Outreach project took place on April 25, 2003, from 10:00 am to 4:00 pm at the ODOT Training Center in Salem. The summit was divided into two parts, a morning session with the university teams and an afternoon session joined by advisory committee members and invited guests. Those invited included persons interviewed for the project, planning commissioners and staff who had attended the pilot workshops, DLCD field representatives, and persons to whom we were referred. Kathryn Frank from UO facilitated the sessions.

Consistent with our TGM work program, the first summit was intended to provide students an opportunity to present information from the pilot workshops and obtain constructive feedback from the invited guests. Specific goals included:

- Facilitate coordination between the PSU and UO project teams
- Receive input on workshop process
- Receive input on educational materials

Attendees

PSU

Jennifer Dill
Steve Johnson
Carolyn Bonner
Evan MacKenzie
John Mermin
Darren Muldoon

Mike Rose

UO

Bethany Johnson

Bob Parker

Kathryn Frank

Tina Nunez

Michelle Pezley

Paul Seilo

Advisory Committee

Bill Adams (TGM)

Sumner Sharpe (Parametrix)

Michal Wert (MW Consulting)

Invited guests

Eric Jacobson (TGM)

Marguerite Nabeta (DLCD)

Michael Ronkin (ODOT)

Marc Schlossberg (UO)

MORNING SESSION

The morning session began with welcome and introductions. Kathryn Frank provided an overview of the purpose of the first summit and reviewed the agenda items. During the introductions, each participant identified one thing they wanted to get out of the summit. Following is a list of student objectives:

- Learn from UO about process
- Ideas for access management
- Examples of workshop questions
- Relation between UO & PSU program emphases—urban/rural
- Learn more about planning issues
- Learn from “experts” on issues of implementing smart growth at the community level
- How to discuss principles of smart growth in small communities; info on PSU program
- Improve questions posed during planning commission workshops

- Rural examples of “smart” growth
- Reflection and integration

PSU team report

Jennifer Dill described the structure of the PSU team. PSU doesn’t have a CPW-type structure, so they had to create a structure, which was accomplished through a class. PSU had a larger group in winter term, and a smaller, more focused group in spring. Steve Johnson, an adjunct faculty member, is organizing and facilitating all of the planning commission workshops for the PSU team.

The PSU team has six students working on the project during spring term. Three are working on the PowerPoint presentation; the other three are working on written materials. The first workshop was scheduled last Monday. The PSU presentation got bumped because of an agenda item that went much longer than scheduled.

Jennifer shared a workshop schedule.

They conducted all of the interviews early on. Steve did the interviews.

Steve discussed the fact that a lot of the jurisdictions are close to the Portland area and that the response has in some instances been that “we don’t need more information about smart growth.”

Jennifer indicated that they started with the questions UO developed for the planning commissioner workshops, but are planning on using a simpler version.

Jennifer discussed the written materials and the specific target audience. She posed the question of whether we were developing materials that more or less already exist. How comfortable do people feel about writing factsheets on topics on which they have limited knowledge?

Steve commented that this project is best viewed as a listening exercise rather than a training exercise.

UO team report

The UO team report was partially addressed during the discussion of the PSU team report.

Michelle Pezley described the CPW structure—required course for 1st year CRP students. The team began with research and interviews.

Paul Seilo discussed the UO approach to the presentations. The initial concept was to have a single presentation for all of the communities. As we got into communities it became clear that having a presentation that was oriented to local issues was more effective.

Tina Nunez described the process of contacting the local planning director/staff person to identify local issues and activities. Tina indicated that we have had to filter the information provided both by our local staff contacts as well as input from commissioners. Tina summarized the results of the pilot workshops; the details are included in the “lessons” below.

UO has been flexible within the dialogue process and is refining the questions.

PSU/UO Lessons

- Good pictures are hard to find
- Coordinating with big files is difficult
- Coordinating, preparing and developing the PowerPoint is a challenge. (Initial presentation was 110 slides; pared down to 30-40 for draft version)
- Build presentation around topics/modules
- Differentiate between urban and rural; rural communities are tired of hearing about urban examples
- Direct experience with communities helps us better understand smart growth
- Our role is facilitating, encouraging dialog about smart growth, etc; not as “experts” to solve local problems
- Planning commissions may not benefit much from written materials, instead they want to build a better relationship with the state through conversation
- Planning commissions tend to do current, site/subdivision specific decisions; we can help them think about long-range planning
- Some planning commissions have very limited knowledge about state agencies, policies, etc.
- Don’t spend time in workshops explaining TGM
- We’re not in a position to speak for ODOT, direct what they do, or explain how they interact with communities
- Some communities have negative perceptions of state agencies (ODOT, DLCD)
- There is a direct correlation between local planning director enthusiasm and success of workshop
- Those interviewed during the expert interviews seemed more negative about the term “smart growth”, compared to communities; expert perceptions depend on person’s specific interest and are not always reflective of perceptions in communities
- Community impressions of the term “smart growth” are not negative, they just want to know how to implement the principles at the local level
- A big issue for small communities is connectivity
- Commissions relate smart growth to local needs; some feel a disconnect between their needs and state expectations

- Introduce yourself informally to planning commissioners before meeting starts
- Room setup makes a difference; ask for roundtable discussion rather than traditional commission setup
- Establish workshop as informal, rather than formal gavel meeting
- Focus workshops on one key issue—planning commissioners have trouble processing multiple issues
- Include local photos in PowerPoint presentation; bring a digital camera and just insert the pictures before the meeting
- Recognize recent/ongoing planning efforts within the communities, highlight accomplishments
- Set ground rules for discussion in communities, the planning commissioners like to get of the specified subject
- When asking about assistance needed, do not limit the question to “How can the state help you?”
- According to the communities that have participated to date, key transportation and land use issues for communities are:
 - Lack of funding
 - Lack of connectivity
 - Providing for transportation disadvantaged
 - Lack of community vision
 - Difficulty maintaining infrastructure
 - Antiquated code and/or comprehensive plan
 - Safety
 - Economic development
 - Maintaining/developing sense of place
 - Developing infrastructure for alternative modes
 - Difficulty maintaining traffic flow
 - Lack of coordination with state agencies
 - Un-funded mandates
 - Access management
- Educational outreach format
 - Workshops
 - Commissioners don’t read state materials
 - Books on tape

Ideas

- Coordinate/share pictures
- Take digital camera to workshops
- Meet with planning director/staff before the meeting
- Think about what planning commissioners are not saying
- Do field trips, site-specific outreach

Assistance (External) – Questions for Afternoon Session

- What does TGM want as outputs?
- What should or could TGM do with the outputs?
- How do we close the loop on outreach to continued useful technical assistance?
- How do our educational materials relate to others developed by TGM?
- What alternative formats for educational materials and outreach are there?
- Teams' technical questions
 - How can smart growth apply to small and rural communities?
 - How can communities move forward with implementation? Describe specific tools.

AFTERNOON SESSION

The afternoon session began at approximately 1:15 pm. Kathryn Frank from the UO facilitated. We started with introductions.

Project updates

Kathryn summarized the morning session and the outputs from our discussions. Paul Seilo provided a broad overview of the TGM project, including the workshop format.

Paul described activities that UO has engaged in to date. Michelle Pezley briefly discussed the interview process.

Jennifer Dill provided an overview of the PSU structure and underscored that PSU is engaged in a work program that is similar to UO's. She also indicated that PSU is slightly behind UO since they got their contract in place at a later date. She discussed their experience in Forest Grove and getting bumped from the agenda. PSU is working on briefs and factsheets, and other activities.

Input on workshop process

UO provided an overview of the workshop process. Bob Parker underscored the need for good small community examples of smart growth. We asked Michael Ronkin to share his thoughts with us on bicycle and pedestrian

successes. Following is a list of points that Michael and the other participants made:

- Ask communities for local smart growth examples
- Lots of examples in eastern Oregon: Bend, Baker City, La Grande, Prineville
- Bicycle: Baker City—good street network; Southern Oregon community changes
- Narrowing highways; couplets from multiple lanes – great strategies for slowing traffic, creating a more human scale, etc.
- Small community's interaction/planning with highways is a big issue/opportunity
- Bicycle approaches should depend on community size
- Bicycles need safe parking—used example of ODOT training facility—no bike parking
- Pedestrians concerned about highway crossings
- Skinny streets effective at increasing safety of bicycle/pedestrians
- Communities have difficulties reconsidering skinny streets
- Michael Ronkin has example PowerPoints/photos, will help with specific issues and strategies

Marguerite Nabeta discussed some of the outreach she has been doing with DLCD. She expressed that communities are looking for alternative ways to have bike lanes other than on the street system. Discussed the concept of stormwater management and how that may fit into this work. DLCD's PowerPoint presentations are divided into three of four different sections. She has done the presentations in Oakridge, Coburg, Adair Village, and Scappoose.

What do we want to get out of this project as outputs?

One of the objectives identified in the morning session was to get clarity on what TGM would like to get out of this project. This discussion did not focus on products—the products are clearly defined out our agreements with TGM. Rather, it focused on how TGM and other agencies might use the products from this project and what secondary products might be useful to TGM staff and others.

Bill Adams would like to hear a summary of what planning commissioners want, and how they want it presented. This would occur at two levels: (1) an overview that summarizes trends across all of the communities, and (2) specific issues in each community that we go into.

Present summary to upper management and OTC and LCDC commissions; may happen in the fall. Michal Wert suggested doing them separately. Michal also suggested the CST as a group we should present our findings to.

Bob Parker asked Sumner Sharpe about the relation between this project and the Engage Oregon process. Sumner suggest that we plug into the next Engage Oregon meeting in a week or two and provide a brief update of our initial findings to the EO group. There's some degree of "we've tried the same story before and now we're back again."

Jennifer asked about ODOT beginning to update the Oregon Transportation Plan and how this project might plug into that process. Bill suggested that we talk to Gail Curtis.

Eric Jacobson asked, Are the tools that we currently have through the TGM program the right tools? How do we get them to commissioners? Interaction with people is not necessarily a service we provide—there are too many people. This suggests continued coordination with the two universities. The form could be a request to CST for a package of materials. Sumner shared information on what local directors do in terms of planning commission orientation. Make sure that materials get to people in the form that people pay attention to them. Steve indicated that having a fresh voice is potentially an approach. Is this approach cost effective?

Sumner talked about the OAPA team that provides planning commission trainings. Bob talked about the ethics commission list of planning commissioners. Michal suggested that, at a minimum, a single sheet with resources should be sent out to commissioners.

Bethany Johnson shared an anecdote about Talent. The commission had a new potential commission appointment. The only thing the planning commission asked of the commissioner was, we have 4 hours of reading per week... are you willing to do that?

Ideas/recommendations

- Community planning goals do not have to be mutually exclusive
- State staff have been asked to reduce travel; phone, PSU on-line transportation seminar
- DLCD doing outreach with planning commissions
- Find right content and form for materials
- Join forces with architect/landscape architect students programs—like the Neighborhoods Lab at the UO
- Commissioner turnover leads to less understanding of planning concepts/tools
- Send commissioners a list of resources
- DLCD workshops have been well attended
- Many commissioners do not have web literacy, nor desire to access planning materials
- Video/VCD of planning commission training PowerPoint or smart growth PowerPoint

- Look at other stock outreach programs (Texas)

Input on educational materials

Group 1. Transportation and land use connections

Michal Wert reported for this group.

We discussed barriers in plans and zoning. How zoning dictates transportation; institutional things in place that force non-smart development. We discussed some difficulties on the ground in Beaverton—you have to get variances to do smart growth.

We discussed incentives and how you can encourage people to develop in a manner that is consistent with local goals. We talked about quality of life. We have to frame things in a positive way. Frame in a “this is what it can do for you” is better than “this is a bad thing”.

We talked about performance standards and reviews and things that you could do to encourage people to do positive things on their own.

We talked about the barriers in lending institutions and about getting them to see positive results and positive bottom lines. Developers are a big part, getting them to understand, getting them to use the products we’re developing.

We discussed costs of sprawl and quality of life—things that people can relate to. Water lines, sewer, schools—how to discuss the cost of sprawl of smart vs. dumb development.

We talked about health, the link between obesity, walking, and transportation facilities.

We talked lastly about choice—don’t get out of your car—the important point is that it’s important to have choices.

Group 2. Transportation planning

Eric Jacobson reported for this group.

We discussed four topics: what is a TSP and who needs to do one; the relation between TSP and STP; expressways; and access management.

Cities under 10,000 are possibly exempt from the developing a TSP.

We discussed the relationship between the TSP and the STIP. What people will want to know is that the TSP is how local governments define their transportation needs, and how to meet those. The STIP is how those projects get funded. The OTC is moving towards having the STIP include all local projects. There is always this push and pull between what ODOT wants to build and what local governments want. They want to build interchanges, but not local street improvements. What are your real needs and how to link to funding sources? There is this type of cooperation that goes on between ODOT and local jurisdictions.

The next topic was expressways. From a local perspective, it's important for them to understand that expressways are the type of facilities that divide neighborhoods. In an expressway, the ideal is to have grade-separated interchanges. The at-grade interchanges are where you encounter lots of safety issues. The idea is having an expressway in town and balancing that with safety issues.

The last topic was access management. We think that local governments will want to know why it's a smart growth tool. That's primarily because of safety and efficiency. It's important to recognize that street function changes within a jurisdiction. Local TSPs should provide specific access plans for the major facilities rather than or in addition to the local standards.

Group 3. Design

Bill Adams reported for this group.

We initially focused on street design basics. The draft brief is sort of a street design how-to. We focused on who would get the most use out of this. Use some examples of other places that have implemented these concepts. Provides some references, phone numbers or people—in addition to web site references so people can follow through. Have a next steps section.

We talked about polling the field staff to get some context around the state for this issue. The idea is that most communities are small to medium size cities. Portland examples are relevant. If they are really serious about pursuing these ideas, you have to get them into the local process—to the engineers, planners, etc.

The other thing is that there are some barriers that are being removed—the state fire marshal, the STAs, etc. Make sure your codes are correct, your processes correct, etc.

Three standard sections for all written educational materials:

- Resources
- Examples with contacts
- Next steps

KEY ISSUES AND OUTCOMES

Both sessions of the summit were very useful to the PSU and UO teams.

During the morning, the teams shared their work and began building relationships to assist each other in the future. We identified numerous lessons from the project experiences and generated ideas to improve our TGM workshops and educational materials.

Many of the lessons stemmed from the UO's six workshop experiences. The UO team found planning commissions to be receptive to smart growth concepts and tools. UO had success tailoring parts of the PowerPoint

presentations to one or two community-specific issues related to transportation and land use, and by using examples from the community or similar communities. UO and PSU agreed that the workshops were more about dialog than training or problem-solving.

The key issues arising from the morning session related to (1) how the project's outputs can best serve TGM and planning commission outreach needs beyond the workshops; (2) how the current and future outreach can address the differences between urban and rural/small communities; and (3) how outreach can help communities move forward with implementation, their most difficult step.

In the afternoon, the teams received input from the advisory committee and invited guests regarding the TGM workshop process and educational materials. To understand how the project's outputs can serve continued outreach, it was suggested that the teams gather specific information from the planning commissions concerning the most effective outreach content and formats. Partnerships between TGM and the universities or other groups may facilitate and improve continued outreach. We also brainstormed forums for presenting the results of this TGM project.

The small-group discussions about the educational material topics yielded many insights for content and format. Although this occurred at the end of the day, it was clear that more discussion was possible. The advisory committee and invited guests offered to assist the UO and PSU teams with technical issues as the teams further develop the educational materials. With respect to the issue of how to address the differences between urban and rural/small communities, we were provided with several examples of smart growth/development in rural/small communities across Oregon.

We concluded the first summit with appreciation for all who participated and an informal invitation to the next and final TGM project summit (date and location to be determined).

Summit 2

Friday, May 30, 2003
Portland State University, Urban Center, 2nd Floor Gallery

The PSU team organized and facilitated the 2nd summit meeting. The purpose of Summit II was to share our findings with the planning community and get their feedback and ideas for recommendations.

Attendance

PSU team:

Faculty: Jennifer Dill, Steve Johnson

Students: Paul Bender, Carolyn Bonner, Evan MacKenzie, John Mermin, Darren Muldoon, Mike Rose

UO team:

Faculty: Bob Parker, Bethany Johnson

Students: Tina Nunez, Paul Seilo, Michelle Pezley

Participants (20):

Bill Adams, TGM program

Jim Knight, Retired, former DLCD

Chuck Switzer, Clatsop County PC

John Lawless, Eugene PC

John Charles, Cascade Policy Institute

Dan Kaempff, ODOT Public Transit Division

Brian Dunn, Kittelson & Associates

Denny Egner, City of Lake Oswego PC

M. Elena Uhing, Forest Grove PC

Bill Blank, Scappose PC

Jean Senechal, Portland Office of Transportation

Ron Skidmore, Clackamas County Planning staff

Mohammad Fattahi, Clackamas County Planning staff

Ann Beier, DLCD

Jerry Powell, AICP, GHFL

Dan Vizzini, Lake Oswego PC and City of Portland Environmental Services staff

Larry Krionzyk, DLCD – TGM

Steel, Sandy PC

Michal Wert, MW Consulting, project advisory committee
Carolyn Briggs, Gladstone PC

Morning Session

The PSU and UO teams met in the morning before the invited participants arrived. The students went over their presentations for the afternoon and planned the afternoon discussion activity. After lunch, the students attended a seminar on Portland's Transportation System Plan.

Afternoon Session

Invited participants started arriving shortly before 1:30 pm. Samples of the written materials were enlarged and posted for review and comment. The powerpoint presentations were also running automatically on two laptops. Participants were encouraged to view the materials and presentations before starting the session.

The afternoon session started with a welcome from Jennifer Dill and self introductions. Students from each team (Evan MacKenzie, PSU, Paul Salo, UO, and Tina Nunez, UO) made presentations summarizing the activities and findings to date.

The group broke into four smaller groups for discussion, each focusing on two categories of outreach and technical assistance. Each group could also discuss additional topics under an "other" category. Two students lead each group discussion. Participants were asked to write ideas for each category on paper. These were discussed and posted. The ideas are all recorded below.

Field Trips

- Walking tour of downtown, what is good in their own community
- Walking tour of proposed site
- Be specific on field trip purpose and what you want to see
- Well-organized
- Combine field trips with multiple jurisdictions
- Include walking
- Only make a trip when information cannot be gathered otherwise
- Reduce need for transportation
- Consolidate trips
- Use field trip time for education while traveling
- Annual PC dinner with training and field trip
- Tour with the objective of finding improved areas that can be used to replace toxic, inferior neighborhoods
- Neighborhood association host field trips
- Tour of other community projects (good examples)

- Field trip replaces monthly meeting once a year
- Always focus on local sustainability and carrying capacity
- Do field trip at OPI (Oregon Planners Institute) – look at examples in Eugene

Increased Coordination

- Give presentation to home builders and ask them to subsidize presentations to developers
- Have community meetings to determine healthy sustainable objectives
- Do video of results and make available to elected and appointed officials
- Regional workshops to increase coordination across jurisdictions
- Early meetings with state/local interests (before decision making)
- Community-wide meetings to involve interested parties
- Give workshops to city council and planning commission simultaneously
- Have city council liaison on planning commission
- Advocate for ODTO and DLCD to maintain a community/local government training program
- Put all of DLCD and ODOT pictures on a central website for reference
- Have a catalogue of reference projects, maintained as the state level
- Make video and cassette library available, link to ODOT Technology Transfer

Planning Commissioner Network/Conference

- Put on regional networking sessions and have key state agency specialists attend
- Seek foundation/non-profit funding to support PC network, have consortium of universities be the sponsor, not the government
- Add a separate section for planning commissioners at OPI. Provide a setting for commissioners to sit around a table at the conference
- Afternoon workshop from DLCD Staff – give an orientation for commissioners on Oregon planning process, i.e. periodic review.
- Would planning commissioners come to the conference even if it was cheap/ reduced price for commissioners? Other expenses: time, lodging,
- Issues: Small towns many not be able to afford to attend the conference. Thus, you must have a planning commissioners network.

This would allow commissioners to hear what others have done – how to get through the TSP process.

- Statewide and regional network
- Methods of Communication: web page, email, list-serve.
- Contact names to ask questions of – i.e. how did you do your comprehensive plan?
- Create clearinghouse website, chat room, including a calendar
- Exchange with other PC websites, if any
- Create directory of communities identifying members: years of service, expiration date, telephone numbers, fax numbers, e-mail addresses
- Hold an annual, semi-annual or quarterly conference
- Convention – invite all support services to have booths. Do at convention center and various sites statewide
- Workshops throughout the state
- Gear section of DLCD [web site] for planning commissioners
- Create a monthly or semi-annual magazine or newsletter
- Utilizing local university facilities, staff, and students to bring PCs together more often
- Listserv similar to OPN for planning commissioners
- Outreach manager at DLCD – staff!
- PCs ought to be required to network in their community
- Build networks around cultural and place norms
- Trade conference registration fees for in-kind localized training/speaking on planning issues
- Put on *regional* networking sessions and have key state agency specialists attend
- Sister city concept – networks of "like" PCs

Speaker Series

- Groundwork: Capacity Building
- Levels: (1) Skills/process; (2) Ideas/concepts
- Needed not just by planning commissioners.
- How do you run a public meeting, how can it be an engaging process with all people participating?
- Try to find ways to involve the high schools and begin to educate youth about community planning and sustainability and livability
- Statewide speaker series

- Speakers programs are too often linear and goal directed, rather than educational and community focused
- Offer speakers to community: city council, planning commissioners, advisory boards, neighborhood/business associations, citizens
- Develop a basic planning commissioner planning guide and provide to each new PC. Do this in coordination with AOC and LOC. Need to do this annually as new members come on board.
- Civic organizations
- Local new sources
- Train a speaker's bureau
- Speakers need to include pictures from the local town in the presentation. This establishes a local connection. Audiences like to see themselves in the presentation.

Issues/Questions to answer

- What are the issues?
- How do we make them aware?
- How do we identify speaker that can best address the issue?
- How do we appeal to the speaker. How do we compensate them if we do?
- Town hall approach?
- What is the best time to have a speaker? Evening? Weekend?
- Breakdown audience: public, planning commission, city council, developers, etc.
- How often? Monthly, semi-annually, annually?
- Address the public concerns – where: school auditorium, library, etc?
- How long should a presentation last?
- How to get all parties together
- Issues with having one speaker going around the state to talk to planning commissioners:
There is a bias against “out of towners,” some towns may not listen. People who don’t agree, may not show up to the table, or they will just show up to heckle the speaker.
Preaching to the choir issue
- Issues need to come imbedded in larger context (beyond TGM & Smart Growth)
- Topic Areas should be broad for speaker's series.

Potential topics

- Leadership training

- Framework for what skills needed
- Coordination (funding)
- Identify topics facing planning commissioners and base presentation on how to help them deal with those topics
- Skills: Leadership, civic capacity, meeting management, communication, decision-making, planning concepts
- Ideas: takings and "Dolan," sustainability, growth management, land use planning goal, TGM, economic development
- Pro & con representative
- Actual case history experience
- Public awareness
- Series that explains land use and process to general public
- Speakers that can educate about the statewide planning process
- Need to do a better job explaining why planning is worth doing and how/why up-to-date plan and ordinances are critical to community's future
- Legal issues
- Planning process: running meetings; approval process for different activities
- DLCDC "topic orientations" when a community begins a major planning project (e.g. TSP, periodic review, parks master plan, etc.)

Good Examples (small/medium-size communities)

- Fairview Village
- Orenco Station
- West Bend Village
- Sunnyside Village
- NE Newberg Specific Plan
- Dupont, WA
- Broadway/Downtown Walnut Creek, CA
- Broadway (old pedestrian mall) re-opening, Eugene, OR
- Chase Gardens, Eugene (private)
- Broadway Place, Eugene
- Call Ron Kellett at UO Architecture Dept.—database of smart development projects
- McMinnville Oregon Hotel redevelopment
- Lakeview downtown (human scale, parking in rear)

- Downtown Lake Oswego (mixed use, development improvements)
- Madras, OR: downtown sidewalks and curb extensions
- Hood River downtown
- Astoria downtown (human scale building)
- Troutdale downtown
- Newport: Wonnerf street at Nye Beach area
- Umatilla Mission Trail – CTUIR

Good examples of smart growth projects (small/med) towns:

- Astoria
Tourism (ex. of tool) & fishing – these add to quality of life
ex. of downtown market: tool to allow place ??
used mix of TIF & urban renewal (check this?)
- Lakeview
similar to Astoria yet not as far
- Troutdale
ex. of city (public) and developer/property owners (private) funding project
ex. of cooperation b/w public and private (give & take, i.e. parking requirements)
ex. of storefront development
ex. of mixed-use
similar to what Santa Fe and Santa Barbara
- Lake Oswego
ex. of mixed-use
city bought land/ then private
- Tualitin commons
ex. use of urban renewal
- Do not stress vertical mixed-use in rural areas: inappropriate

Workshops

- How to use tools available
- Marketing downtown
- Neighborhood associations *and* local business owners/tenants
- Basic planning concepts; city with county
- Road shows: Take it to the PC, give them a menu
- Outreach, public involvement strategies
- Community solutions teams
- Jurisdictional policy makers (open to public)
- Chambers of commerce

- Home-builders associations
- Alexander Garvin (American City, What Works and What Doesn't): use information and present to cities

Short Written Materials

- ODOT TSP planning guidelines
- Citizen guide to planning commissions
- Guide to funding improvements
- One-page summaries of smart growth strategies: density, narrower streets, pedestrian orientation, etc.
- Victoria Transport Policy Institute: www.vtpi.org
- Explain role of TSP and RTP
- TPR framework and role of PC, elected, planning. Top/down flow.
- CPO workshop
- Citizen training
- Cultural issues
- How to get a transportation project built
- Clearly define purpose and limitation of standard funding sources – federal, state, local. Relation to top/down federal -> state -> locals. MPOs, air quality.
- One member mentioned *The Guide to California Planning*, and how most of the book applies to Oregon since the book is general. Another member mentioned that no citizen will read a book to find out about planning.
- Guides to people – not just planners – explains aspects of government, such as city council, planning commission, role of planners, and how to initiate projects, who to contact, timeline, process, etc. All agreed citizens need simple readable documents.
- A short guide explaining funding sources
- Make materials available for all cultures, especially Hispanics

Information about funding

- Legislative actions – past, present, future (LSN, OTIA...)
- Simple explanation of who are the transportation players and what funding sources do they provide
- Partnering with ODOT (if state highways)
- ODOT money for local streets (TGM; bike & pedestrian)
- Job Access Reverse Commute grants
- Know your code and who's responsible for what – jurisdictions and property owners

- Web site with information about funding – a grant clearinghouse
- Planning commission education about different sources of funding – local, state, federal
- CPO education about funding needs
- Citizen education about the importance of local funding such as gas tax, LID, etc.
- Local funding options and their legal framework – SDCs, fees, taxes, LIDs, districts (TIF)
- Develop calendar for various transportation funding programs
- Business Energy Tax Credits
- Transportation Management Associations
- What are the tax implications?
- How ODOT is structured (and maybe other organizations like Metro)
 - what ways to contact ODOT
 - Explain what ACT is and who to contact
 - How to get involved
 - Who to contact locally, in your region
 - Contact info for regional offices
 - Maintenance districts
 - How to initiate a project
 - Funding Options
- Involve financial/lending institutions more in the process.
Commissioners blame the developers, the developers blame the lending institutions. Convince banks to offer smart growth loans, etc.

Other technical assistance

- Use of internet as a resource. ODOT TGM website, other sites
- Use GIS with aerial photos to show good/bad
- Educating about community culture – planning commission, CPO
- Don't expect people to show up at your meeting – go to theirs (Rotary, Chamber, neighborhood, etc.)
- For the long-term the community needs to be educated overall, so they won't have to do it right before a grant. Lake Oswego neighborhood planning: Before a neighborhood groups gets a grant they should get up to speed on planning. (Planning 101)
- Can a volunteer citizens group deal with level of complexity.
- Power struggle between agencies (port, state, etc.) competing priorities.
- How do you get info out to the public?
- How do you get people working together not against each other?

- Start with basic information, “What type of places do you feel comfortable”

Other (not outreach, technical assistance)

- Role of regulation in smart growth. People are resistant to smart growth, they think it's a Trojan horse for state mandates
- What transportation is really necessary? What does it accomplish?
- I like natural healthy growth of large open space and having it accessible to walking
- Only recommend projects that improve sustainability and reduce impact
- Role of regulation?
- Power struggle between governments
- Put teeth back into Goal 1
- How to get city and county governments to better manage and implement planning within UGBs?
- Use state financial investments to stimulate and promote smart growth – when to say yes and when to say no.
- Flexibility in planning rules. It's not as arbitrary as public thinks. Lots of room for community design and growth management – remove fear of inflexibility
- Smart Growth: No clear definition. Everyone has their own definition. Should be put into context of a wide variety of strategies.
- Overcoming bank's reluctance to fund smart growth projects.

Conclusion

Each group presented 2-3 key suggestions from their discussion. Additional ideas that came from this discussion included:

- Highlight ***process*** and design
- Show performance measures, such as sales, rental rates, etc.
- The OAPA list for publicizing events needs to include planning commissioners
- Explain ODOT, including ACTs, regions
- The final report should present findings by size of community
- What are we going to do with the discussion? It would be nice to know TGM's commitment to these programs.
- Listening is key.
- Planning commissioners (and others) want to see results/feedback quicker. Past experience has been that it's slow to see results.

- Need to consider who is impacted when developing citizen involvement programs.
- Are we better off with TSPs?
- Need to educate elected officials also
- Need to provide examples of downtown and greenfield

Appendix E

Workshop Evaluation Form

Your feedback on today's workshop and discussion is very important. We will use this feedback to improve future workshops.

Presentation	Strongly Disagree				Strongly Agree
The topics covered are timely	1	2	3	4	5
The information presented was useful	1	2	3	4	5
I learned something new	1	2	3	4	5
The presenters were effective	1	2	3	4	5
The computer presentation was effective	1	2	3	4	5
I will use some of the ideas presented today in my work as a planning commissioner	1	2	3	4	5
 Discussion/Focus Group					
The discussion covered issues that are important in our community	1	2	3	4	5
There was enough time to discuss the issues	1	2	3	4	5
The facilitator did a good job focusing the discussion	1	2	3	4	5
The discussion generated some useful ideas	1	2	3	4	5

How might you use some of the ideas presented today? Please describe:

Your Thoughts on Planning

Before today's workshop, had you been aware of the State's Transportation Growth Management (TGM) program?

☐ Yes ☐ No

Before today's workshop, what was your level of knowledge regarding the planning ideas presented, such as smart development, integrating transportation and land use planning, and "smart growth"?

I knew nothing		I knew a lot
1 2 3 4 5		

Some Background

What is your position?

- ☐ Planning Commissioner (current)
- ☐ Planning Commissioner (former)
- ☐ Planning Director
- ☐ Planning Staff
- ☐ Other: _____ (please describe)

If you are currently a planning commissioner,
how long have you been in the position? _____ years

Future Assistance

We will be developing written materials on a variety of topics related to today's presentation and discussion. The materials will be short, 1-4 pages in length and aimed at planning commissioners. Would format do you you prefer for reading such materials?

- ☐ Paper
- ☐ Web Site
- ☐ Paper and Web Site

Are there specific topics for which you would like additional information or assistance? If so, please list them here:

Any other thoughts?

Thank you for your time and assistance!

